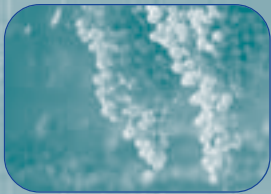




CALIFORNIA REGIONAL ECONOMIES PROJECT

Central Sierra Economic Base Report



Central Sierra Region Economic Base Report

A Product of the
California Regional Economies Project
2004

*Prepared by
JK Inc.*

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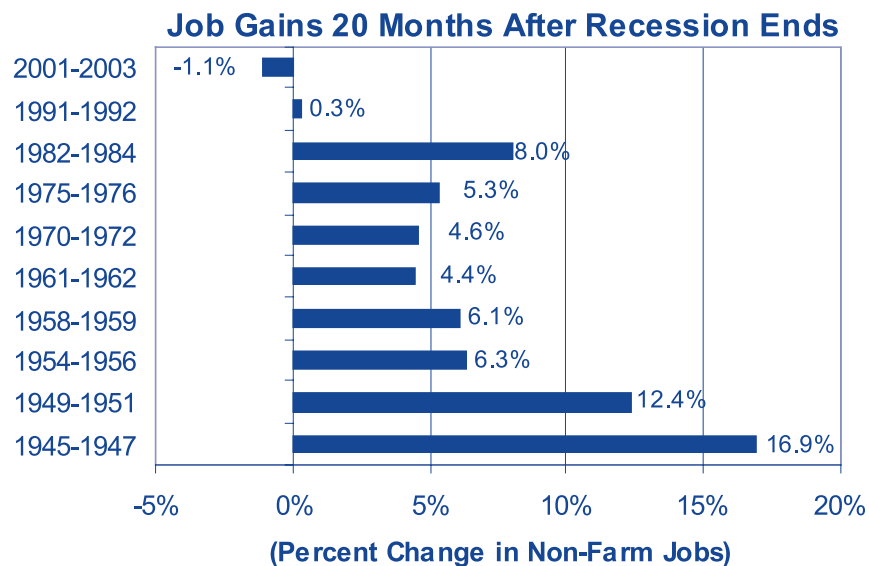
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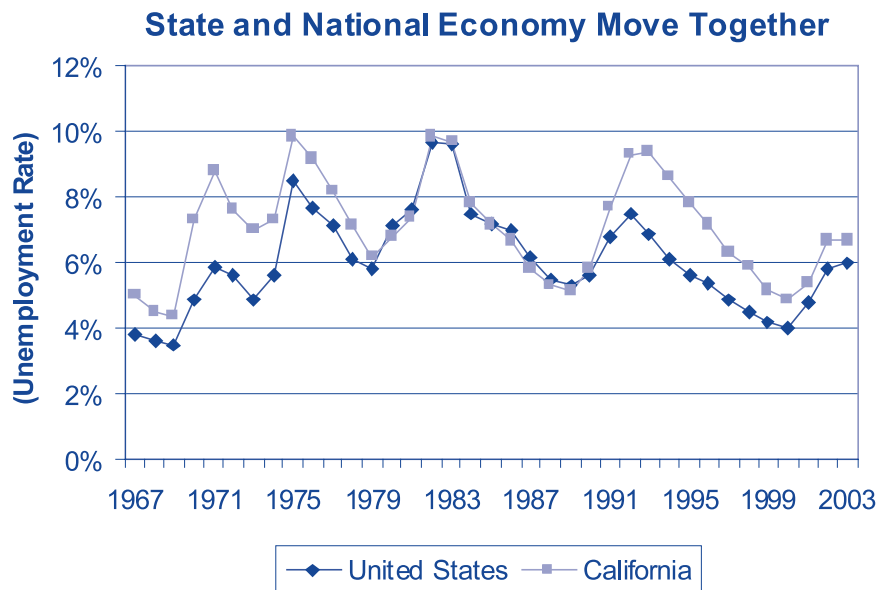
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The State and National Economic Context

The nation is beginning to recover from the weakest job recovery since the Great Depression. In every recession since World War II, job levels were higher 20 months after the recession ended, **except in the recent period**. The average jobs gain 20 months after the last seven previous recessions is 5%. A 5% increase in national jobs in the 2001-2003 period would be equal to more than a 6.5 million gain. Instead, the nation has **lost an additional 1.5 million jobs since the end of the recession**.

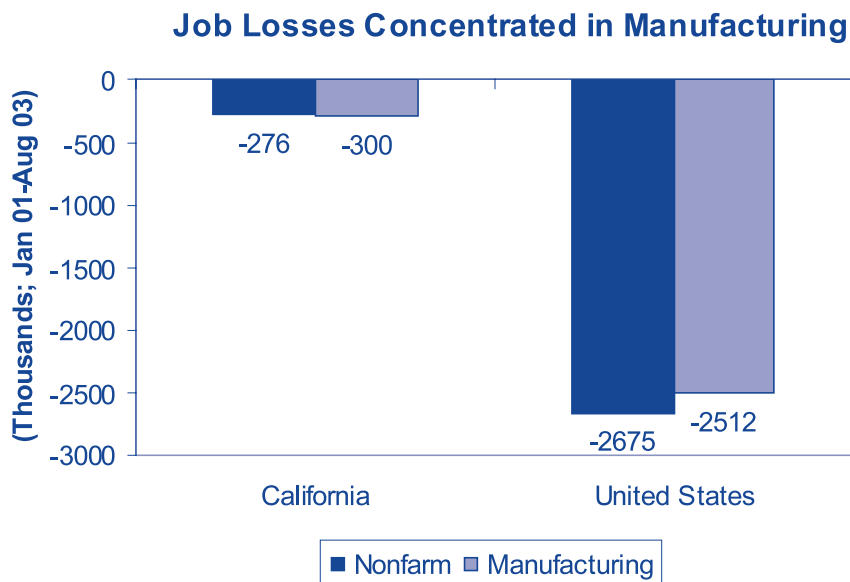


A strong national job recovery is essential for renewed job growth in California. While California can produce strong job and income growth when the national economy is growing, there are no cases when California prospered while the national economy was weak. In fact, as measured by unemployment or job and income growth, the state and nation have a long history of moving up and down together.

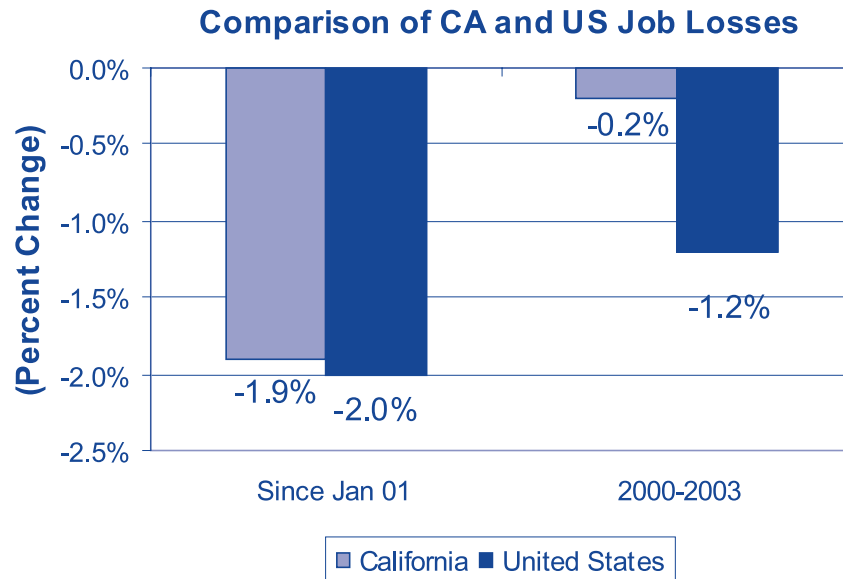


The only two times that the state and nation differed in economic cycles was in the early 70s and early 90s when California trailed the nation as the result of sharp cutbacks in defense spending.

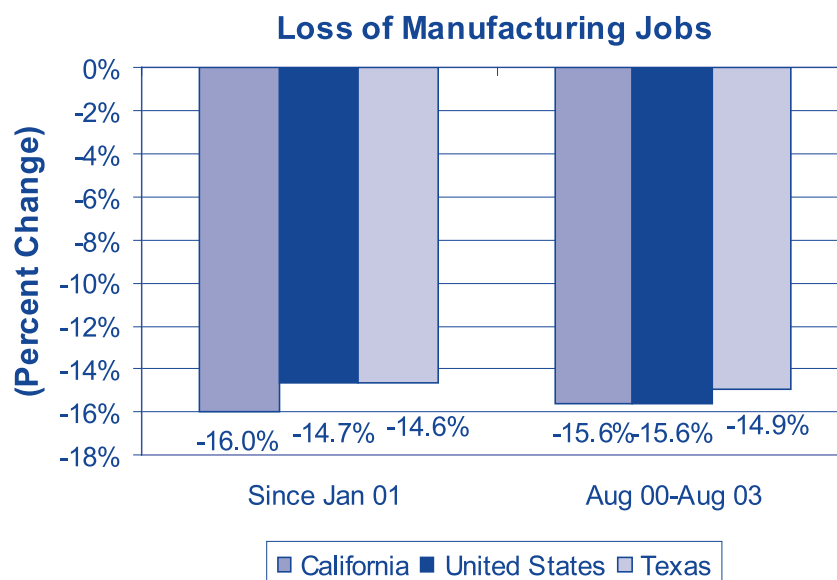
Since January 2001 when the recession began, California lost 276,000 nonfarm wage and salary jobs. During the same period, the state lost 300,000 manufacturing jobs. So, the state's entire recent job losses are accounted for by declines in manufacturing. The same picture emerges at the national level. Since January 2001, the nation lost 2.7 million jobs, of which 2.5 million were in manufacturing.



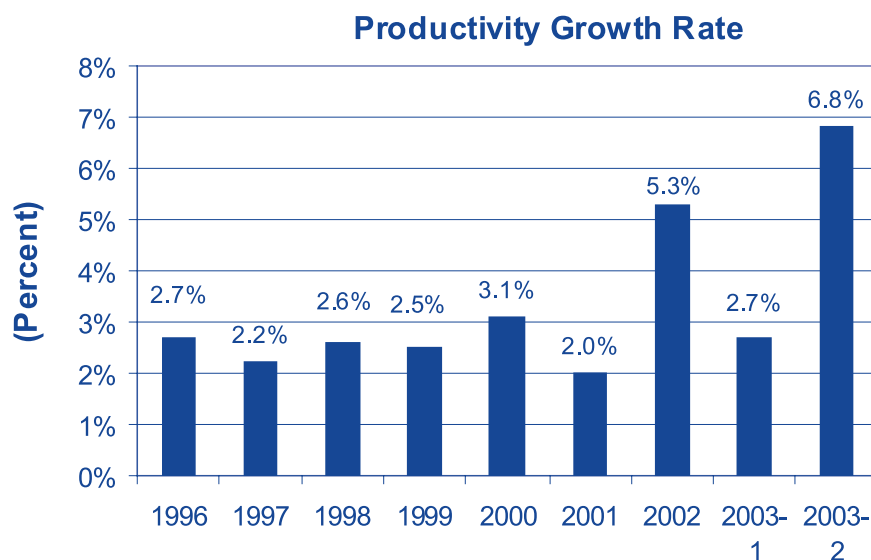
California has the same rate of job loss as the nation or has done a little bit better, depending on what time period is used to measure changes in job levels. Between January 2001 and August 2001, California lost 1.9% of the state's nonfarm jobs, while the nation lost 2.0%. When comparing average job levels in 2000 and 2003, state job levels are down 0.2% (26,600 jobs) while the nation's losses were 1.2%.



Manufacturing job losses were similar among California, Texas and the United States. Manufacturing job losses were approximately 15% since 2000 and did not vary much depending on what time period is used.



Productivity growth is one explanation of the “jobless” recovery. High productivity growth allows firms to produce more without needing additional workers and, in some cases, to produce more **with fewer workers**. Productivity growth has reached unusually high levels in 2002 and 2003. In 2002, productivity growth averaged 5.3% over 2001 levels. Roughly speaking, this level of productivity growth requires real GDP to grow at higher than 6.5% to reduce unemployment rates.



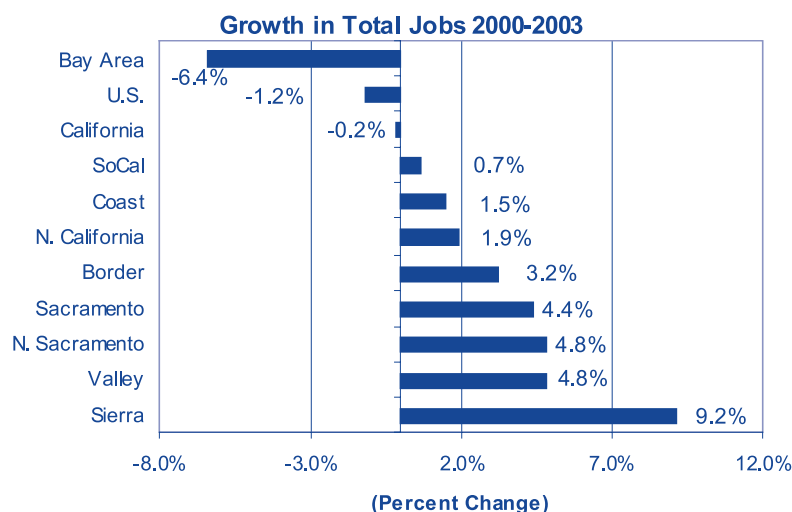
In the third quarter of 2003, productivity growth in the non-farm business sector was 9.2%. Therefore, GDP gains of 8.2 % in the third quarter should be enough to secure job growth. However, despite strong productivity and GDP growth, it is not certain that the nation will end the year with more jobs than in January 2003. And the labor force normally increases by 2 million per year.

Productivity growth is essential for long-term prosperity. Productivity growth allows profits and wages to increase and living standards to rise. But, in the short run productivity tends to eliminate more jobs than it creates. Moreover, the jobs created are not necessarily compatible with the skills required in the jobs that were eliminated. Only time brings about equilibrium in the supply and demand for labor.

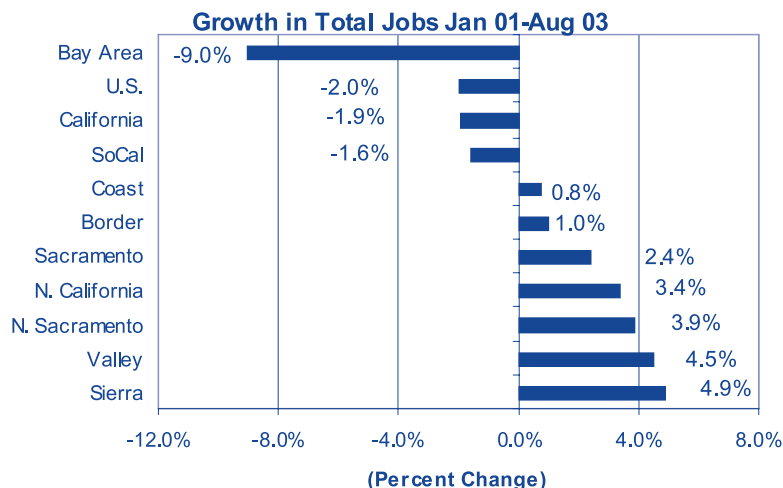
Therefore, in the short-term, this exceptional productivity growth makes the job of getting back to full employment much more difficult. And this productivity growth explains “where” most of the lost manufacturing jobs went - not to another state, not even abroad (although some did), but were simply lost because firms needed fewer workers to meet rising sales levels.

Job Growth Centered in Rural Economic Regions

The Bay Area is the only economic region that lost jobs between 2000 and 2003. The Bay Area lost 253,300 jobs comparing the annual average job levels in 2000 and 2003. The state lost 26,600 jobs. The other eight economic regions **added 226,700 jobs**. Job gains of more than 4% were recorded in the Central Sierra (CS), Greater Sacramento, Northern Sacramento Valley (NSV) and San Joaquin Valley (SJV) economic regions. Southern California posted a small (0.7%) job increase. The CS economic region experienced a 9.2% job increase during the 2000-2003 period recording the best net new job growth record in the State¹.



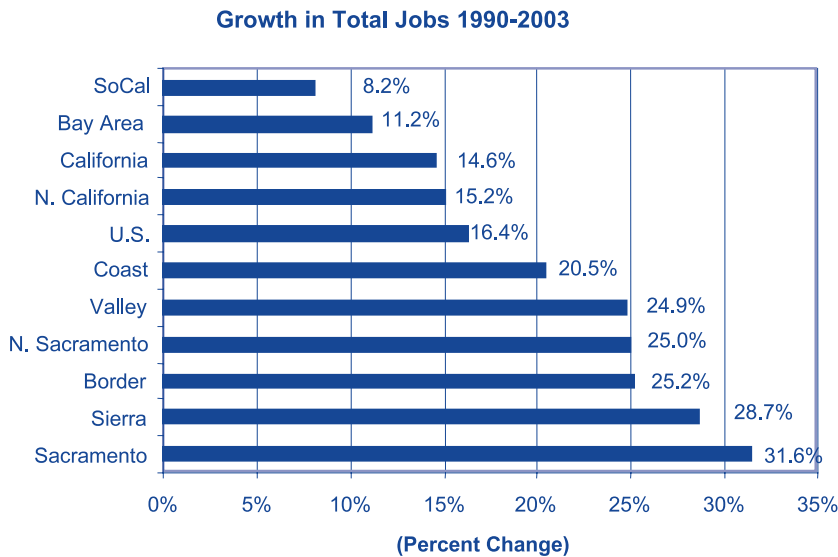
The overall pattern of regional employment growth does not change much even if one looks at the period starting at the beginning of the recession in January 2001. From January 2001 through August 2003, the Bay area lost 9.0% of the economic region's job base. Southern California had a job decline of 1.6%, less than the nation's 2.0% job loss, and **all other economic regions of the state showed job gains**, led by Greater Sacramento and four of the State's five rural economic regions. The CS economic region had the second highest with a job gain of 4.9% the highest job gain for all rural economic regions.



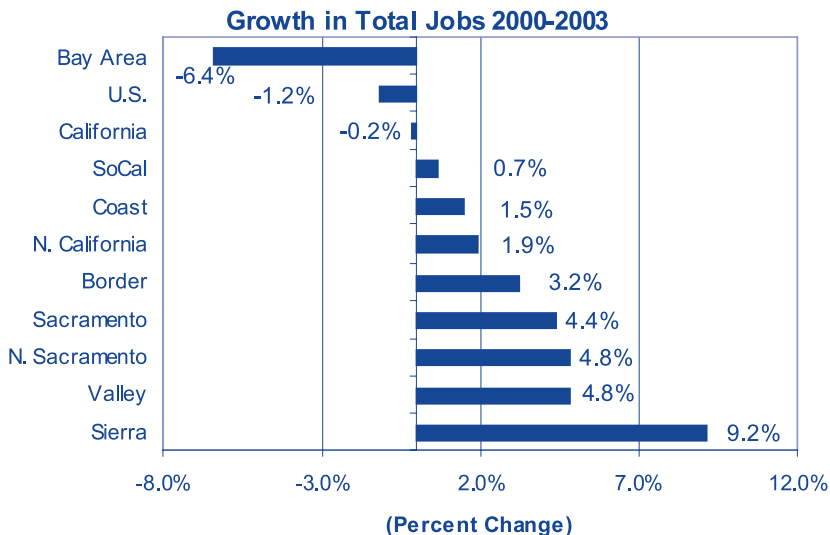
¹ Comparable data for Inyo and Mono counties in 1990 and 1991 was not available for inclusion in this report. Therefore, data for the Central Sierra region is based on the remaining counties in the region for these years.

Comparison of Economic Regions

The Bay Area and Southern California had the lowest job growth rate since 1990 among the state's nine economic regions. Jobs in the Bay Area increased by 11.2% compared to the nation's 16.4% gain. Only Southern California with an 8.2% increase trailed the Bay Area. The Greater Sacramento economic region had the largest gain at 31.6% followed by the CS economic region posted a 28.7% increase in jobs over the 1990-2003 period. This increase was greater than the U.S., California and the two largest economic regions in the State, the Bay Area and Southern California.

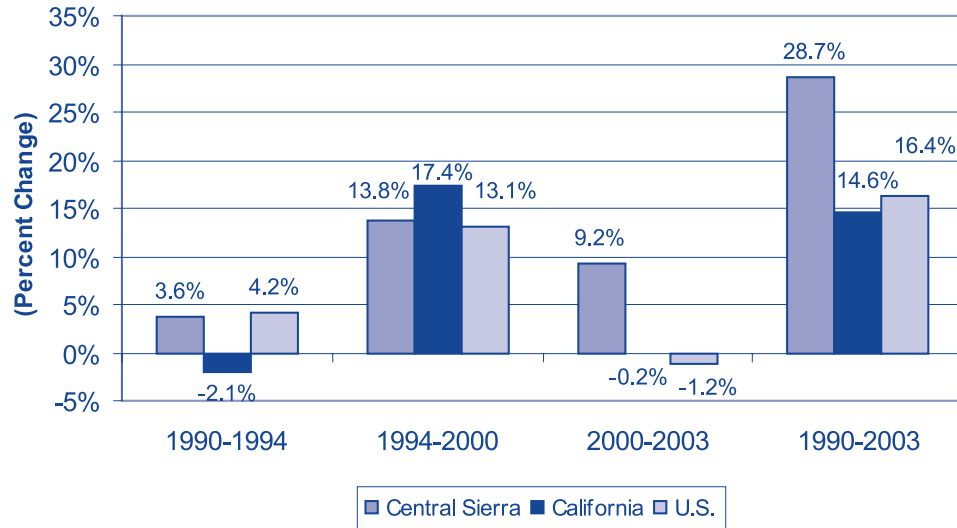


Trends in total job growth between 1990 and 2003 were also reflected in the most recent data from 2000 to 2003. The Bay Area continued its decline by losing 6.4% of its job base, more than either the U.S. or California, despite the fact that all other economic regions in the State experienced continued job growth. At a growth rate of 9.2% the CS was the highest in the State over the three-year period. However, this is somewhat misleading due to the significantly lower job base in the CS economic region.



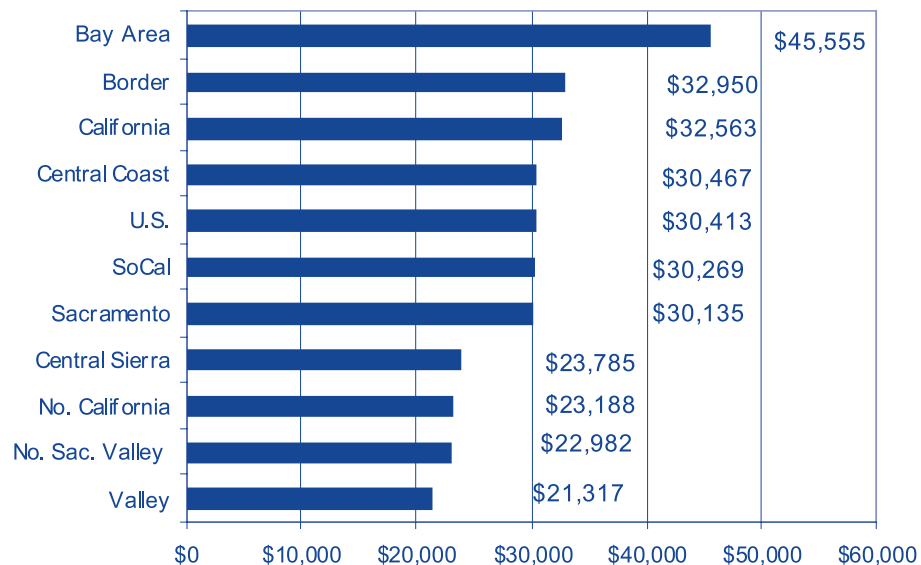
Growth in total jobs for the 1990-2003 period can be viewed for each of three segments in the period. This view illustrates the cyclical nature of employment growth during this relatively brief period. For example, the percentage of job growth in the CS economic region was higher than the State during each quarter of the period with the exception of the first quarter, 1990-1994. But it ranged between a low of 3.6% and a high of 13.8% during the thirteen-year period and had an overall average of 28.7%.

Growth in Total Jobs

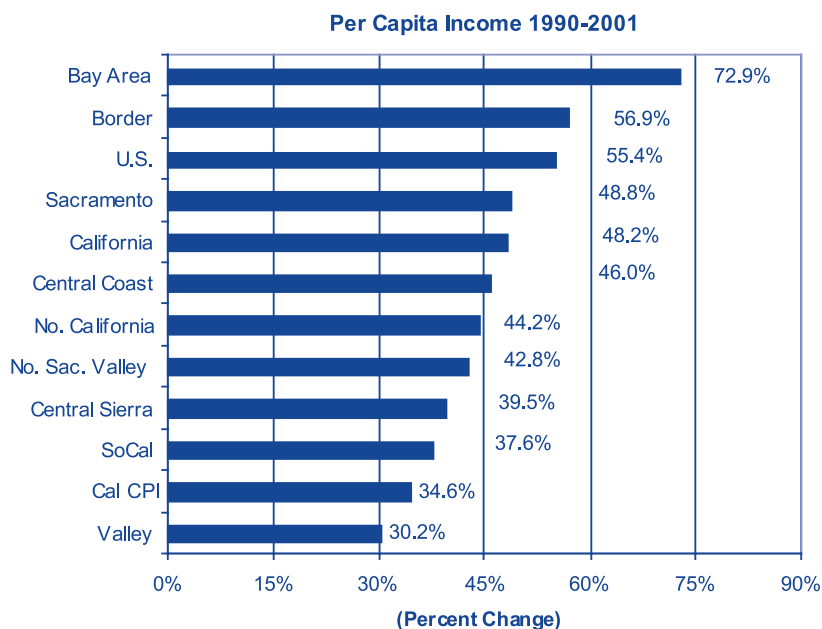


Per capita income for all economic regions in the State demonstrates clearly the three-tier character of income distribution. The Bay Area stands alone in per capita income at \$45.5 thousand well above that for CA, the US and any other region in the State. California, the U.S. and four economic regions follow with per capita income levels between \$32.9 and \$30.1 thousand. The CS economic region along with three other rural economic regions hold down the lowest tier with per capita incomes between \$23.7 and \$21.3 thousand with the CS being the highest.

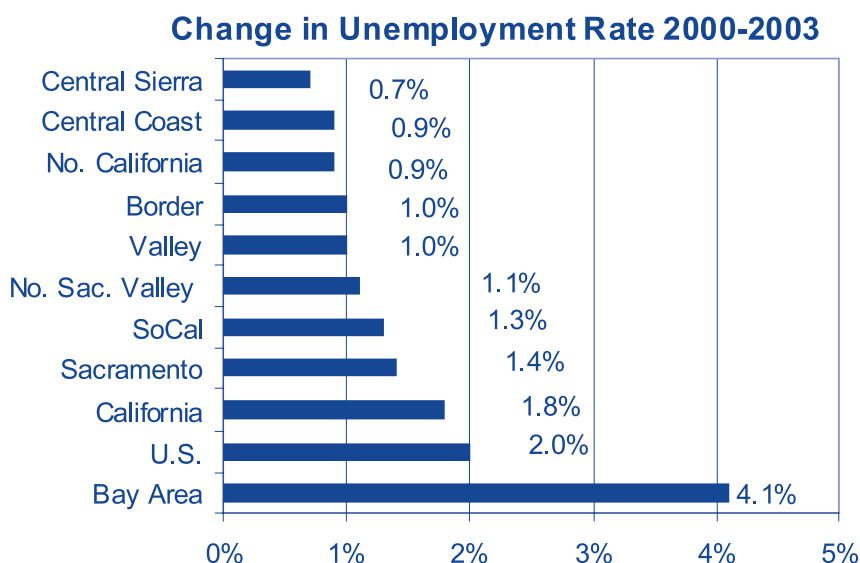
Per Capita Income in 2001

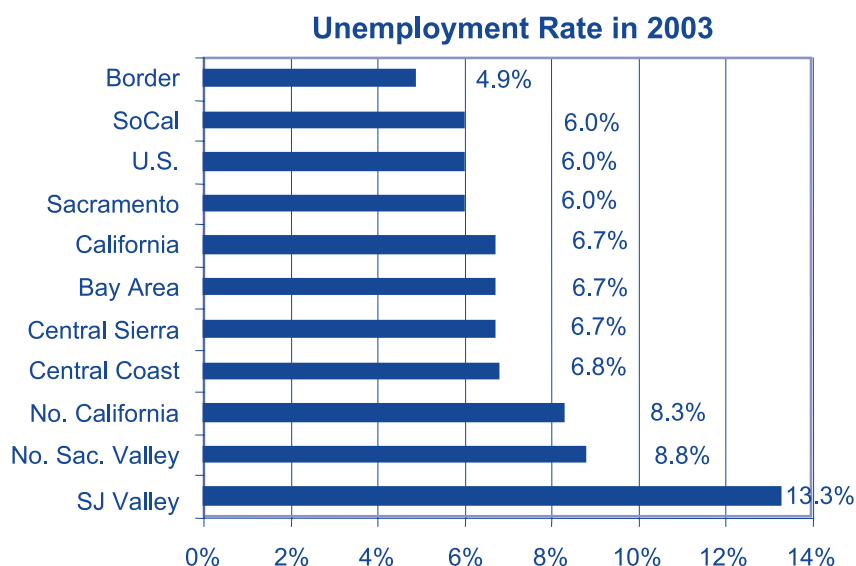


Per capita income growth between 1990 and 2001 further reveals that the three tier characteristics of per capita income in the State changed little during the past decade. The Bay Area led the way with a 72.9% increase in per capita income. The Second tier remained the same with the exception of Southern California, which dropped to the bottom of the third tier economic regions in per capita income growth, below the CS Economic region and other rural economic regions. However, only the SJV economic region failed to keep pace with the California CPI.



The Bay Area had the largest increase in unemployment rates among California economic regions since 2000. Bay Area unemployment rates increased by 4.1%, from 2.6% in 2000 to 6.7% so far in 2003. **Every other economic region of the state, including Southern California, had a smaller increase in unemployment rates than California or the nation.** The Bay Area went from having the lowest regional unemployment rate in California to being near the state average. The CS economic region's unemployment rate increased by less than 1.0%, the lowest increase in the State. It was also less than the increase in unemployment for California and the U.S and far less than that for the Bay Area.

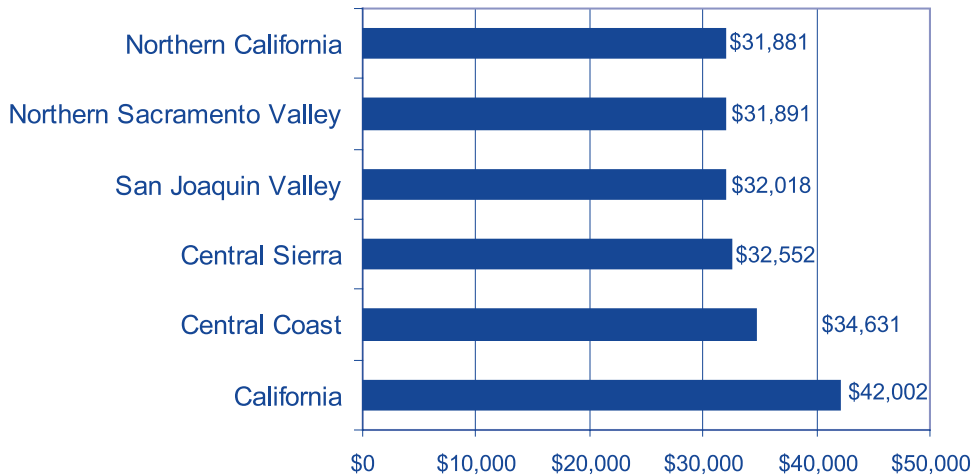




In contrast to the job and income growth previously presented, there is a great deal of similarity among the economic regions in terms of their unemployment rates. The Bay Area and Southern California share an approximate unemployment rate of between 6.0% and 6.8% with Greater Sacramento, the Central Sierra and the Central Coast. The Southern Border Economic region is clearly better off than other economic regions with an unemployment rate of 4.9%. The CS economic region had an unemployment rate of 6.7 %, equal to the average for the State, lower than the U.S. and the four other rural economic regions in the State.

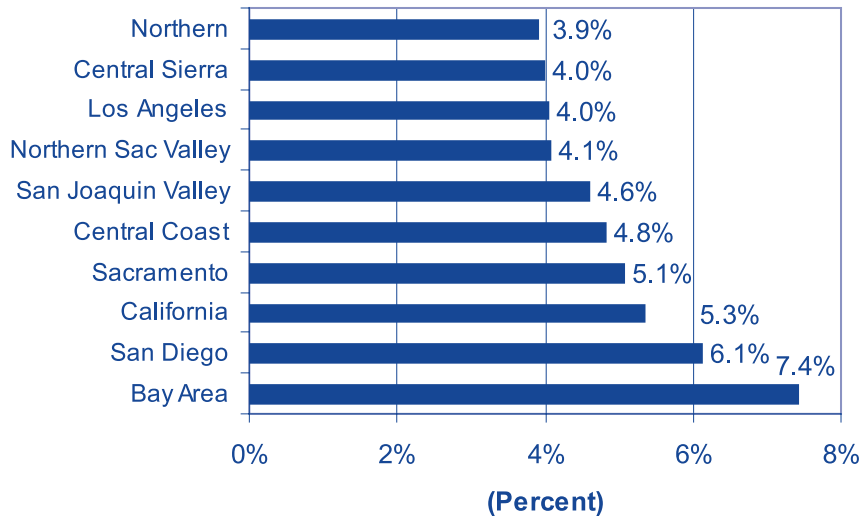
Average wages for the rural economic regions of California in 2002 show the disparity between these economic regions and the average wage for California. This disparity is the major reason for the lower per capita income, which is persistent in rural California. The CS economic region's average wage in 2002 was just over \$32,000, better than SJV, NC and NSV but less than the Central Coast among the State's five rural economic regions.

Average Wage in 2002



Data on average annual wage growth in the rural economic regions of the State also shows little change in the three-tier income system that is reflected in the per-capita income data for the 1997-2001 period. The CS economic region, for example, had an increase in average wages of 4.0% over the four-year period for which data was available. This was the second lowest wage growth in the State, which was 5.3% during this period.

Annual Average Wage Growth 1997-2001



High unemployment rates and low wages are the primary problem facing the State's rural economic regions and are particularly pertinent to the level of performance of the CS economic region. Low wages result in less purchasing power in the area to support local serving businesses and high unemployment rates keep wages down. The solution to this situation lies in the expansion of sectors and firms that can pay above the minimum wage in their industry and still remain competitive through increasing productivity.

Major Industry Sectors in the CS Economic Region²

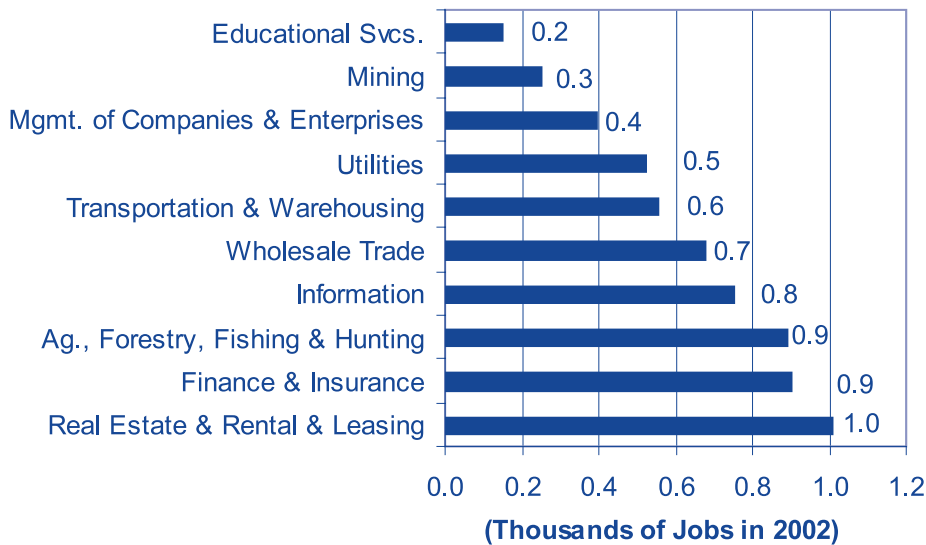
The major industry categories for reporting job data have changed with the introduction of the North American Industry Classification System (NAICS). Some of the major industry categories like Construction, Manufacturing, Financial Activities, Wholesale Trade, Farm and Government, have either identical or similar names to the previous SIC-based categories and cover approximately the same set of industries and workers. The NAICS Retail Trade category is the same as before, but without eating and drinking establishments, which have been moved to the new Accommodations and Food Services sector.

Leading industry sectors in the CS economic region based on the number of jobs in 2002 include All Government (Federal, State and Local) with 18,700 jobs, Accommodations & Food Services with 10,100 jobs, Retail Trade with 7,300 jobs, Health Care and Social Assistance with 4,200 jobs and Construction with 3,600 jobs. These five industries contribute 43,900 jobs to the CS economic region's economic base of 59,400 jobs or 73% of all jobs in the CS economic region in 2002.



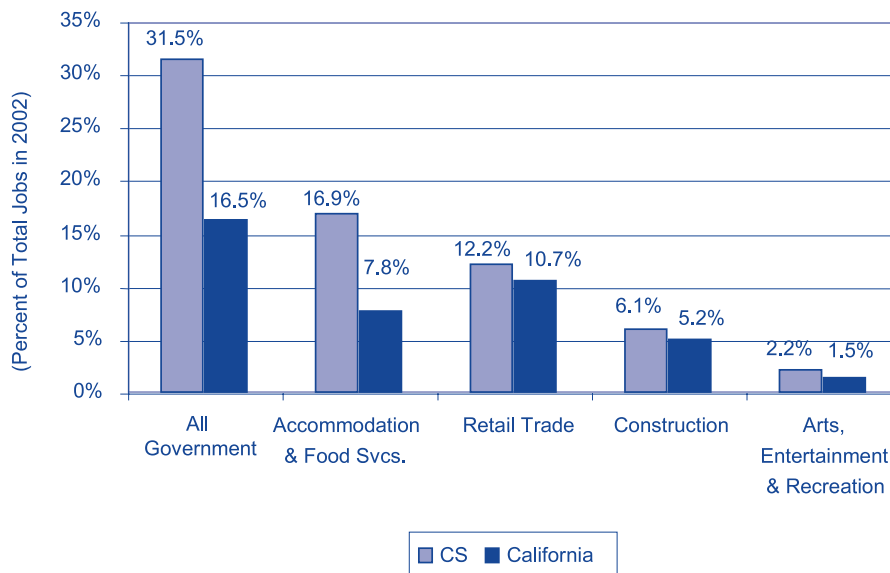
Other industry sectors contributing to the CS economic region's job base in 2002 are listed on the following table. These industries combined to provide additional 6,300 jobs or 2% of the CS job base in 2002. While these industries are not contributing significantly to the current job base, new growth industries may emerge from these sectors as well as the smaller sectors of the leading industries.

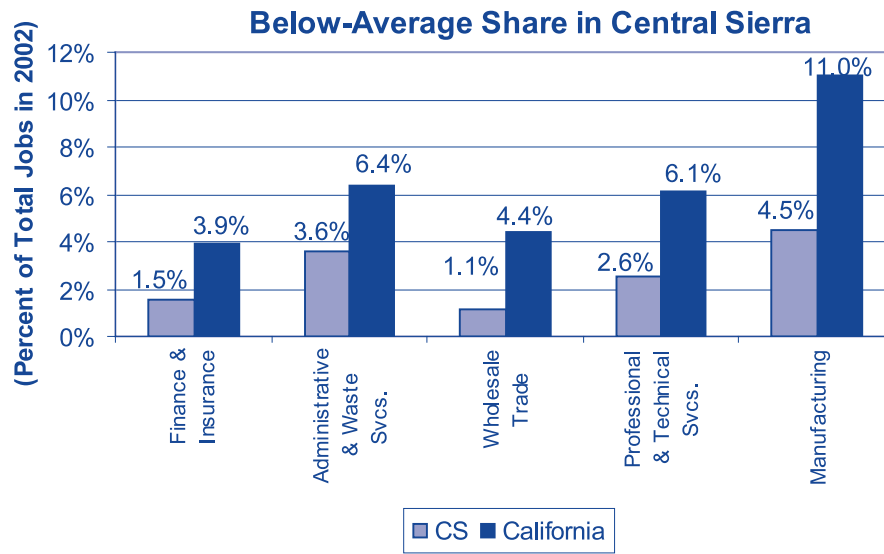
Other Major Industry Sectors



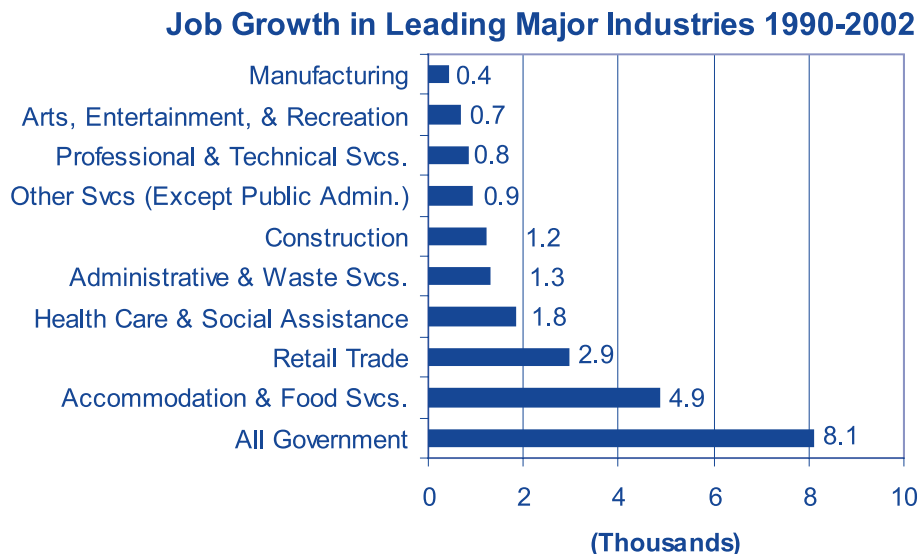
A measure of the importance of each of these industries to the CS Region economic base is the share of total State employment in their respective industries statewide. The following graphics identify the leading industries in the CS with respect to this measure. Five industries were found to have an above average share of the total jobs in their industry while five other industries were found to have a below average share.

Above-Average Share in Central Sierra

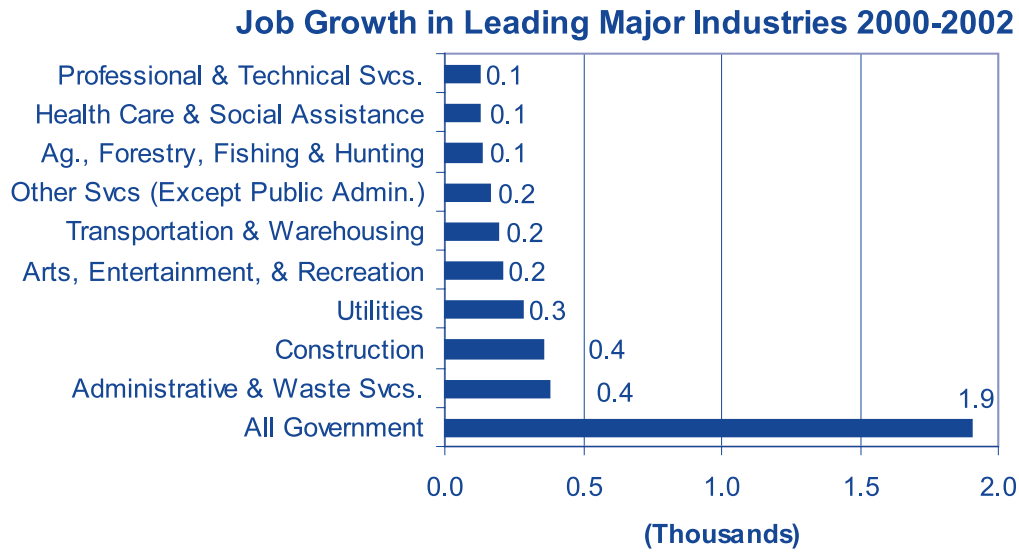




The above tables indicate that the CS economic region is holding a significant share of statewide employment in the four of the five industries that make up 73% of the regional job base. The exceptions are Health Care and Social Assistance, which was contributing 4,200 jobs, and Arts, Entertainment & Recreation, which was contributing 1,300 jobs in 2002. These exceptions indicate that the CS region's share of industry jobs in Health Care and Social Assistance was not keeping pace with job growth in the State. Conversely, job growth in the Arts, Entertainment & Recreation industry in the CS region was greater than that for this industry statewide.



In terms of job growth in the CS economic region during the 1990-2002 period those industries providing the most jobs in 2002 were also the leaders in job growth. All Government led the way with an increase of 8,100 jobs followed by Accommodation & Food Services with 4,900, Retail Trade with 2,900 and Health Care & Social Assistance with 1,800 jobs. These four industries accounted for an increase of 17,700 jobs in the CS region's economic base out of a total job increase 24,600 during the thirteen-year period. This accounted for 72% of the total increase in jobs.



With respect to the most recent period, 2000-2002, the leaders in job growth were All Government which added 1,900 jobs followed by Administrative & Waste Services, 400 jobs, Construction, 400 jobs, and Utilities 300 jobs. Six additional industries accounted for an increase in jobs of 900 jobs. A detailed discussion of the job growth in these sectors will be presented in the following section on the economic base of the CS economic region.

CS Economic Base³

The term economic base is usually limited to those industries that export their products and services outside the jurisdiction that comprises the study area leaving out those industries that primarily or exclusively serve the local population base. This convention, however, is becoming more difficult to maintain since many industries now serve both the local population and the export market extensively.

Therefore, this analysis of the CS as well as the analysis for the other four rural economic regions in the state (San Joaquin Valley, Central Coast, N. California and the Northern Sacramento Valley) include both local serving and export industries in our definition of the economic base. The criteria for selecting the components of the economic base are the top job providers in 2002 and top job generators from 1990 to 2002.

Based on these criteria, the ten industries included in the CS economic base for this analysis are the following*

- All Government
- Construction
- Health Care & Social Assistance
- Administrative & Waste Services
- Retail Trade
- Accommodations & Food Service
- Other Services (Except Public Administration)
- Real Estate & Rental & Leasing
- Professional and Technical Services
- Arts, Entertainment, & Recreation

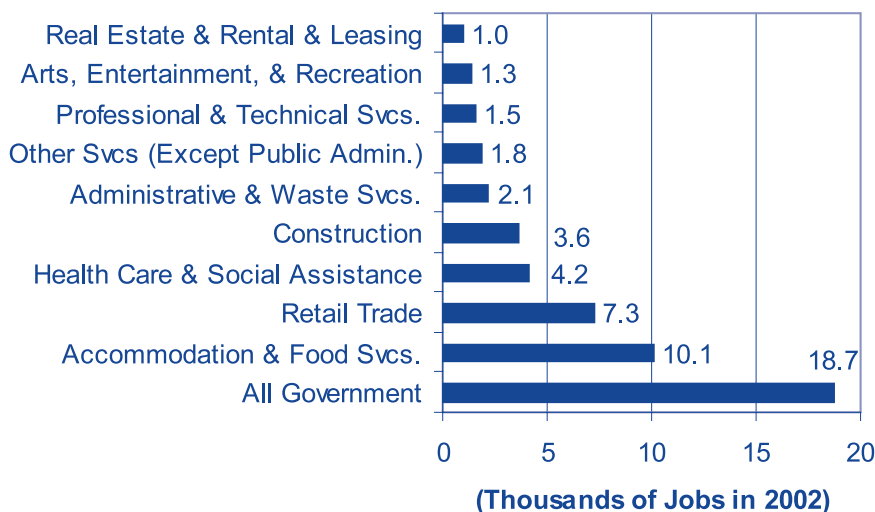
Therefore, in this analysis the CS economic base is composed of the ten industries that provide the greatest number of jobs in the region and/or those industries that have shown the largest increase in jobs over the 1990-2002 period. The overall performance of these ten industries will also be measured by their ratio of job growth to that of the industry throughout the State during this period.

The leading provider of jobs in the CS economic base in 2002 was All Government with 18,700 jobs. All Government was followed by Accommodations & Food Services with 10,100 jobs. Retail Trade contributed 7,300 jobs followed by Health Care & Social Assistance with 4,200 jobs. Construction added additional 3,600 jobs. Five other industries combined for a total of 7,700 jobs. These ten industries provided for 51,600 of the 59,400 jobs in the CS economic region in 2002. This represents 87% of all the jobs in the CS region in that year.

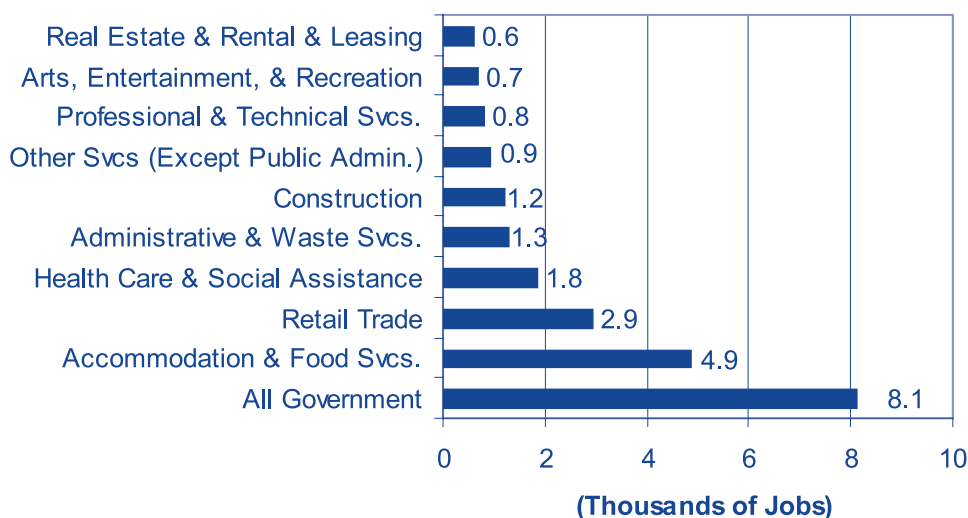
³ See footnote 1, page 6.

* See Appendix A for a list of sub-sectors in these NAICS categories

Central Sierra Economic Base



Change in CS Economic Base 1990-2002



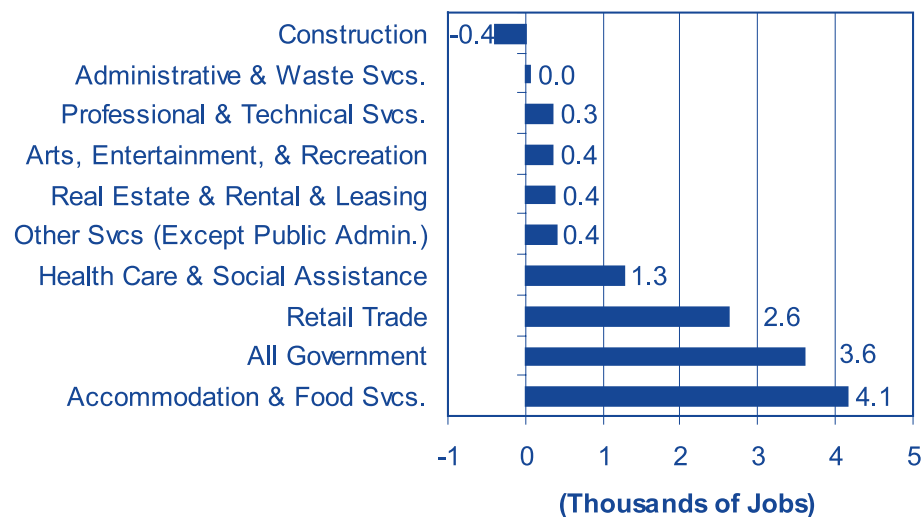
During the 1990-2002 period, the leading job provider, All Government, also showed the most job growth adding 8,100 jobs to the economic base of the CS economic region. Accommodations & Food Services, the second largest provider of jobs was also second in job growth adding 4,900 jobs to the CS economic region during the 1990-2002 period. Health Care & Social Assistance, Administrative & Waste Services and Construction added 1,800, 1,300 and 1,200 respectively to round out the major providers of net new jobs. Four additional industries added a combined total of 3,000 jobs to the CS economic base during the thirteen-year period.

A comparison between the growth in jobs by industries in the CS economic base during 1990-1994, 1994-2000 and 2000-2002 provides an illustration of the various roles that industries in the CS economic base played over the longer thirteen-year period. During the early part of the period, 1990-1994, Accommodations & Food Services was the leading provider of net new jobs to the region creating 4,100 net new jobs. All Government (3,600), Retail Trade (2,600) and Health Care & Social Assistance (1,300) followed this industry.

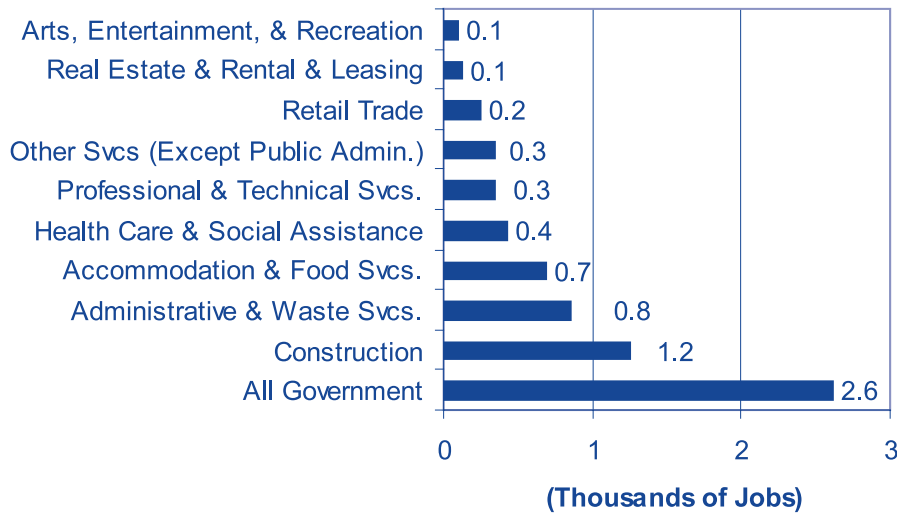
During the 1994-2000 period, All Government led the way with 2,600 net new jobs followed by Construction (1,200), Administrative & Waste Services (800), Accommodations & Food Services (700) and Health Care & Social Assistance (400). Not only did the individual contribution to job growth by individual industries change, but the size of the contribution declined precipitously from what it was in the earlier period for all industries.

In the final segment of the period 2000-2002, All Government continued to lead the way with an addition of 1,900 net new jobs followed by Administrative & Waste Services (400), Construction (400) and Utilities (300). While more consistent with job growth during the 1994-2000 period some industries appeared in the top job providers for the first time during the thirteen-year period. For example, Transportation & Warehousing added 200 jobs to the economic base and Utilities added 300.

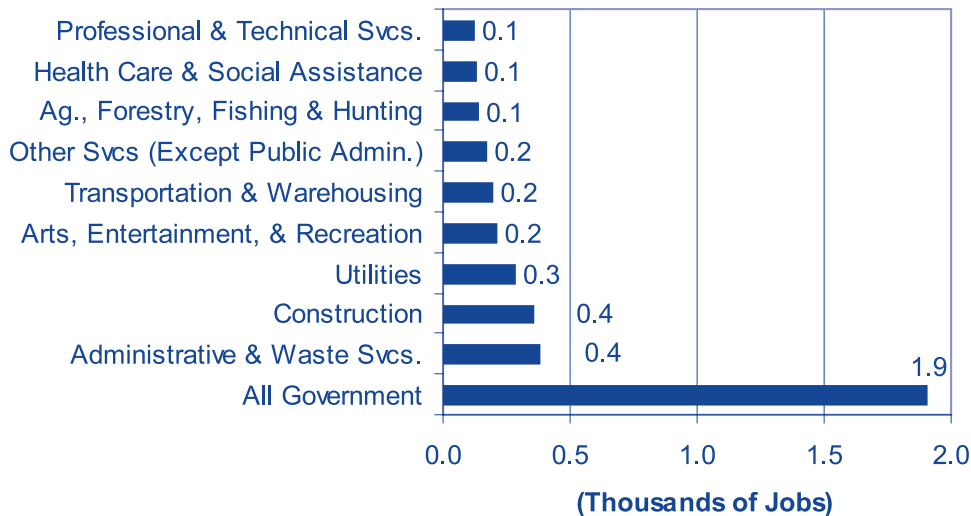
Change in CS Economic Base 1990-1994



Change in CS Economic Base 1994-2000



Change in CS Economic Base 2000-2002

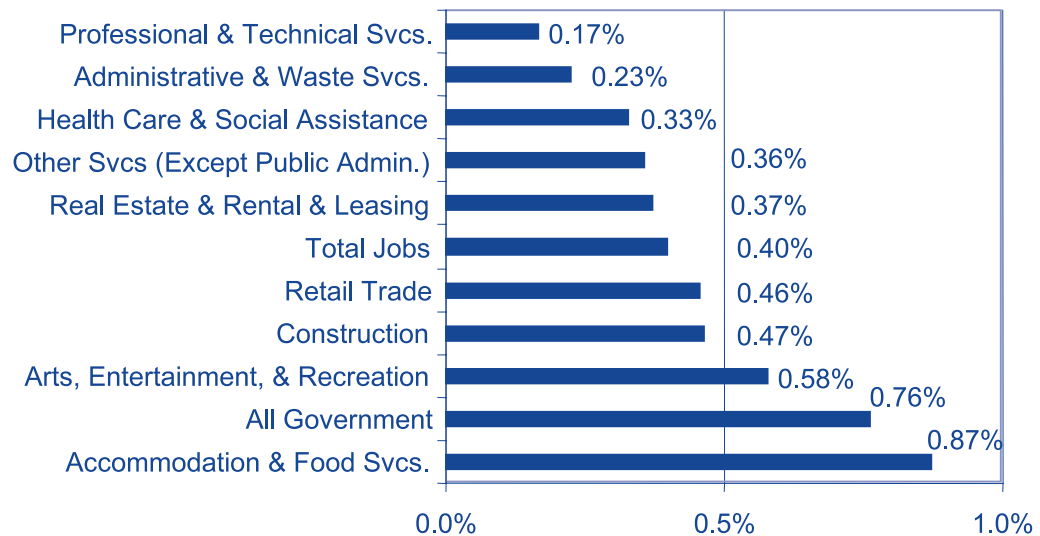


Another way of determining the performance of individual industry sectors in the CS regional economic base is to compare their job growth with that for the State. The following graphics show that the leading industries in the CS are above average in their share of jobs being created in the State in their respective industries.

For example, the CS economic region provides approximately 40% of the jobs statewide for all the industries included in the economic base. Accommodations & Food Services, All Government and Arts, Entertainment & Recreation are providing more than the average share of statewide jobs in their respective industries. Construction and Retail

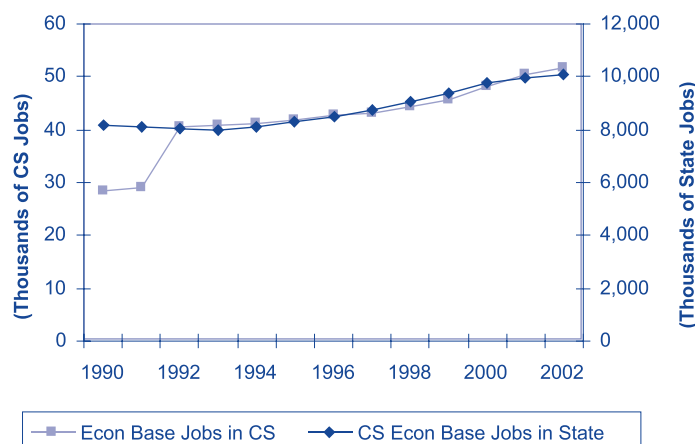
Trade is just above the average while Real Estate & Rental & Leasing and Other Services are just below the average. However, Health Care & Social Assistance, Administrative and Waste Services and Professional & Technical Services are well below the average indicating that there is potential room for growth in these industries in the CS economic region.

CS Share of California, 2002



The following line graph shows the relationship between growth in the CS economic base industries and statewide growth in those same industries during the 1990-2002 period. There has been a consistent parallel trend in job growth between the State and the CS economic base industries over the 1992-2002 period. This indicates that CS businesses in these industries have been keeping pace with industry growth in the State for their industries.

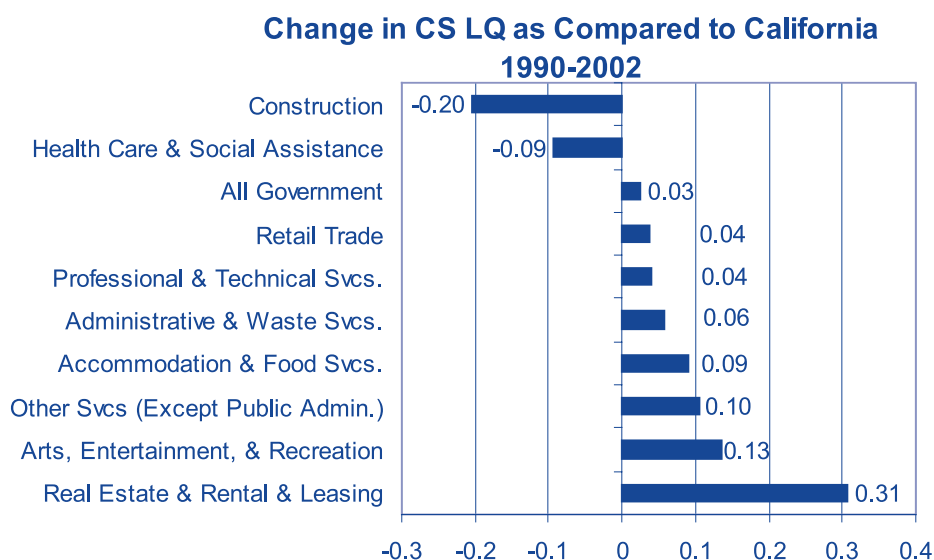
Central Sierra Economic Base



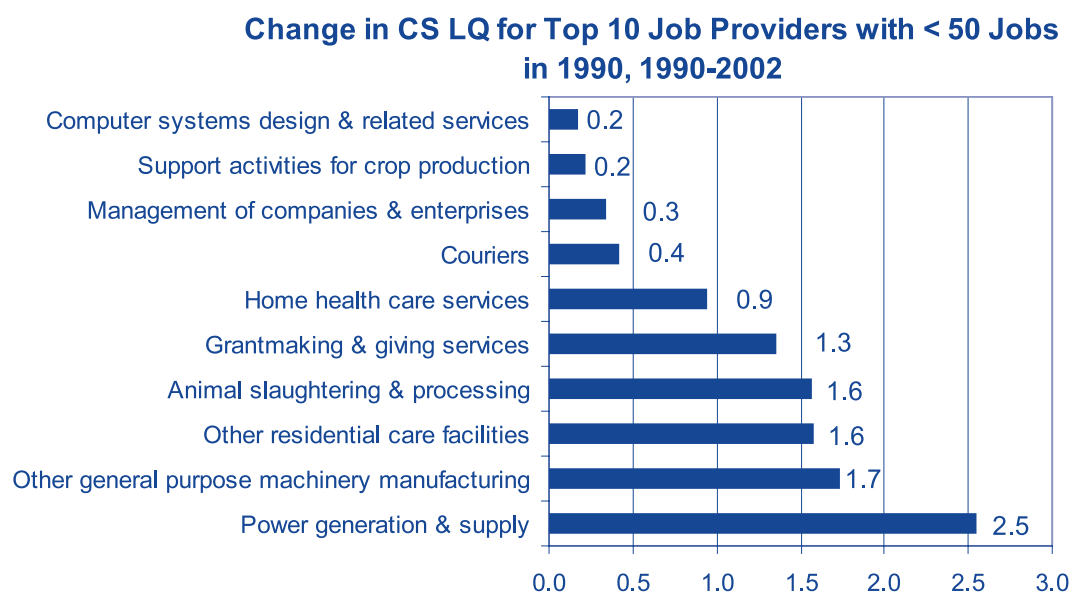
Yet another way of analyzing the performance of the CS economic base is to examine the increase in jobs added in each industry to the total number of jobs added to those industries in the state and how that relative position has changed over the 1990-2002 period.

All but two industries in the CS economic base have increased their concentration over the thirteen-year period 1990-2002. There has been a substantial increase in the concentration of businesses in the Real Estate & Rental & Leasing industry in the CS economic region during this period. In contrast Health Care & Social Assistance and Construction have lost concentration during this period.

The increase in concentration for eight of the ten economic base industries indicates that the CS economic region provides businesses in these industries with a competitive position in their industries.



Increases in the level of concentration in industries that are not among the current major providers of jobs show some of the industries that could be expanding their presence in the CS economic region. The following identifies the top ten industries that started the period with less than fifty jobs and increased their concentration during the period.

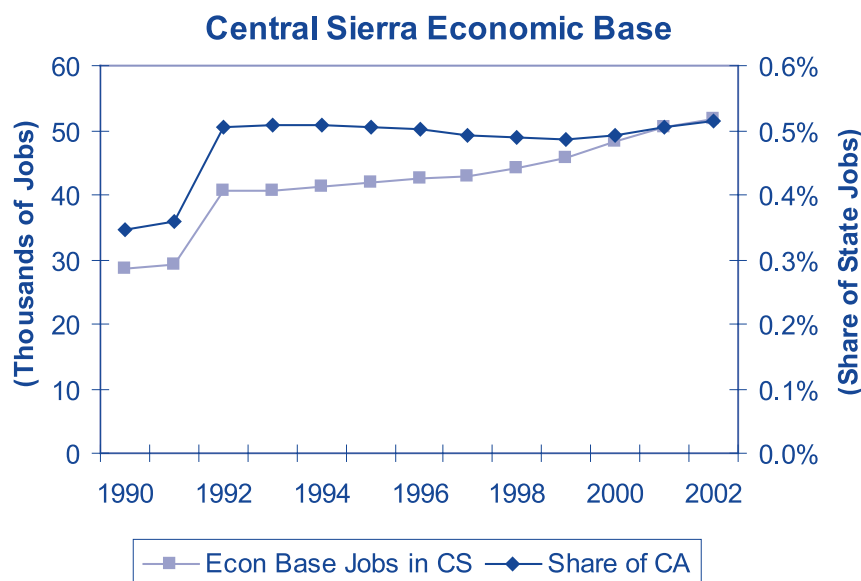


Detailed Descriptions of the CS Economic Base Industries⁴

Each of the industries that compose the CS Regional economic base is made up of several industries at the NAICS three and four digit levels. This section provides the detail on these sub-sectors for each of the ten industries selected for inclusion in the CS regional economic base.

The ten economic base industries in the CS economic region have steadily improved their share of the statewide jobs in their respective industries over the 1990-2002 period. The share of jobs in 1992 shows a differential of approximately 5,000 jobs between the actual jobs in the CS economic base and the number necessary to achieve the 0.5% share which represents average industry growth in the economic base industries in CA. This share was achieved in 2002.

This indicates that the firms in the CS economic base have been creating jobs at a rate equal to the rate of increase in their respective industries statewide. This is a measure of the success of the CS economic base industries to keep pace with statewide growth and signals positive prospects for continued growth in the jobs being made available by firms in the CS economic base.



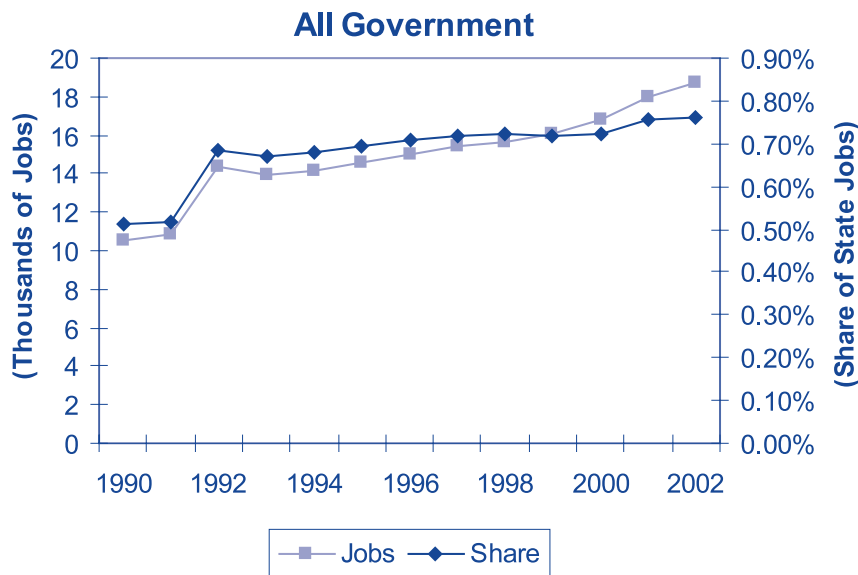
The following sections will provide data on the job growth of the major sub-sectors of the ten industries included in the CS economic base at the three and/or four digit NAICS code level.

All Government

The All Government sector of the CS economic base is composed of jobs in the federal government, state government and local government. Jobs in public education are included in the state and local government sectors. Jobs in private sector educational organizations are not included.

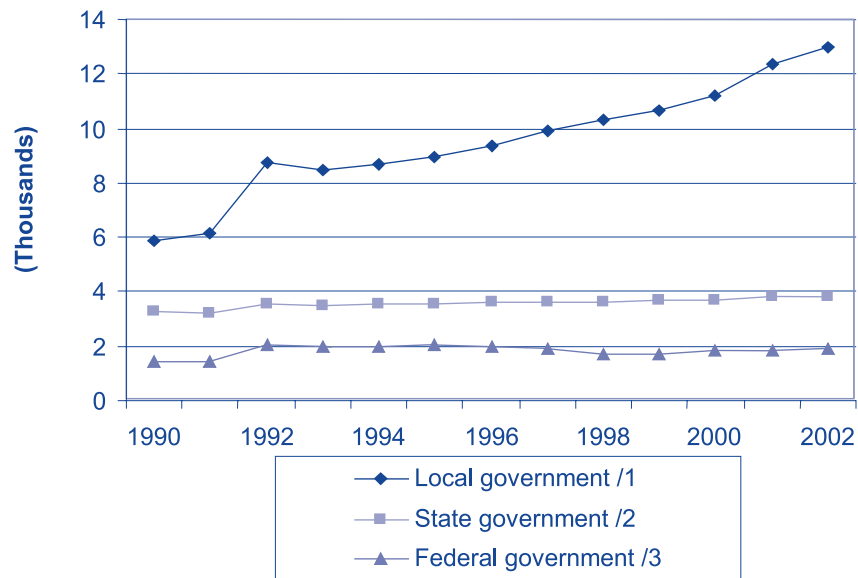
Local government, including education, was the major contributor to job growth in CA during the 1990-2002 period. This sector increased from 1.3 million jobs in 1990 to 1.7 million jobs in 2002 for an increase of approximately 400,000. During the same period state government, including education, increased from 382,000 jobs to 472,000 jobs for a gain of approximately 90,000. Federal government jobs, including defense, decreased from 362,000 to 254,000 a decrease of 108,000 over the thirteen-year period.

The CS share of statewide jobs in these three government sectors has been steady over the 1990-2002 period with the CS share rising to almost 1% of statewide job growth during the last few years of the period.



The graphic below shows the job growth trends for each of the three sectors. Growth in state government was steady over the 1990-2002 period increasing from just over 3,000 in 1990 to almost 4,000 in 2002. The Federal government reduced jobs in the CS economic region from just over 1,500 to just fewer than 2,000. The major contributor to job growth was the local government sub-sector, which increased from almost 8,700 in 1992 to approximately 13,000 in 2002 a gain 4,300 over the ten-year period.

Jobs in Local, State, and Federal Government



Central Sierra Government				
(Thousands of Jobs)				
	1990	1994	2000	2002
Local government /1	5.9	8.7	12.4	13.0
State government /2	3.3	3.6	3.8	3.8
Federal government /3	1.5	2.0	1.8	1.9

Source: EDD

/1 - Local government includes local education

/2 - State government includes state education

/3 - Federal government includes defense

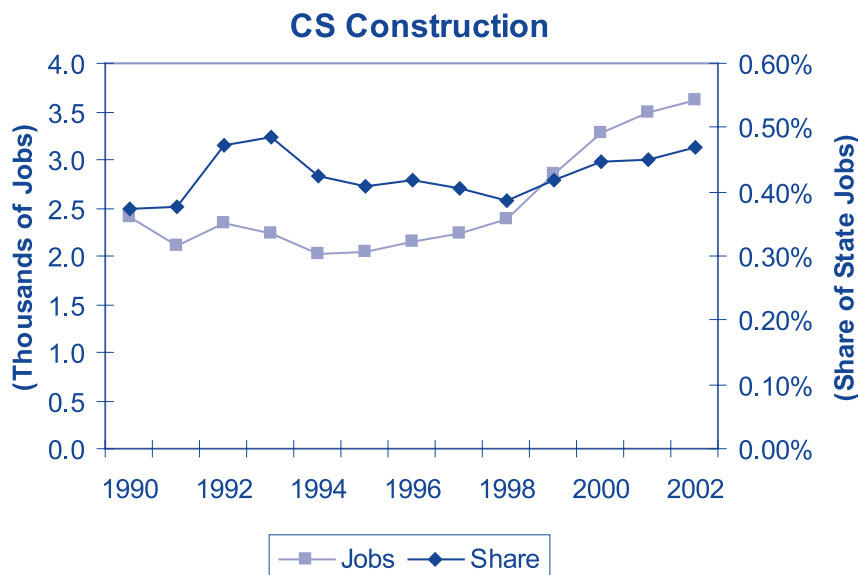
Construction

Industries in the Building, Developing, and General Contracting sub-sector comprises establishments primarily responsible for the entire construction (i.e., new work, additions, alterations, and repair) of building projects. Builders, developers, and general contractors, as well as land sub-dividers and land developers are included in this sub-sector.

Establishments identified as construction management firms for building projects are also included. The construction work may be for others and performed by custom builders, general contractors, design builders, engineer-constructors, joint-venture contractors, and turnkey contractors, or may be on their own account for sale and performed by speculative or operative builders.

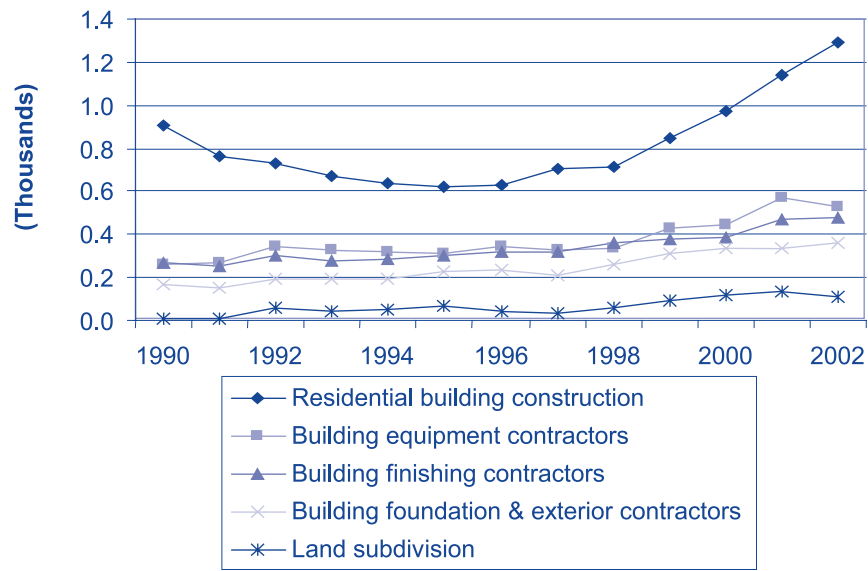
Industries in the Special Trade Contractors sub-sector engage in specialized construction activities, such as plumbing, painting, and electrical work. Those establishments that engage in activities primarily related to heavy construction, such as grading for highways, are classified in Sub-sector 234, Heavy Construction. The activities of this sub-sector may be subcontracted from builders or general contractors or it may be performed directly for project owners. The construction work performed may include new work, additions, alterations, or maintenance and repairs. Special trade contractors usually perform most of their work at the job site, although they may have shops where they perform prefabrication and other work.

Construction was among the leaders in job growth in CA during the 1990-2002 period. This industry grew from 645,000 jobs in 1990 to 773,000 jobs in 2002 for an overall increase of 128,000 or 20%. Construction also played an important role in providing net new jobs in the CS economic region although job growth fell below the regions share of statewide job growth in Construction through most of the thirteen year period as can be seen from the line graph below. However, Construction took a major jump in 1999 increasing to well over its statewide share. This trend has continued through 2002.



Construction jobs in the CS economic region were concentrated in five sub-sectors as can be seen from the line graph below. All five sub-sectors had positive trends in job growth with residential building construction job creation increasing rapidly during the 1996-2002 period after a declining trend during the 1990-1996 period.

Jobs in Construction



Residential building construction provides the most jobs and had the largest increase over the thirteen year period from 900 jobs in 1990 to 1,300 jobs in 2002, a gain of 400 jobs or 44%. The other four sub-sectors provided 1,500 jobs in 2002 an increase of 700 jobs over the 1990 figure of 800.

Central Sierra Construction (Thousands of Jobs)				
	1990	1994	2000	2002
Residential building construction	0.9	0.6	1.0	1.3
Building equipment contractors	0.3	0.3	0.4	0.5
Building finishing contractors	0.3	0.3	0.4	0.5
Building foundation & exterior contractors	0.2	0.2	0.3	0.4
Land subdivision	0.0	0.0	0.1	0.1
Other specialty trade contractors	0.2	0.2	0.5	0.3
Other heavy construction	0.0	0.1	0.1	0.1
Highway, street, & bridge construction	0.2	0.1	0.2	0.2
Nonresidential building construction	0.2	0.1	0.1	0.1
Utility system construction	0.2	0.1	0.2	0.1

Source: California Employment Development Department

Health Care & Social Assistance

Health Care & Social Assistance is a new NAICS category. It includes four sub-sectors, Ambulatory Health Care Services, Hospitals, Nursing & Residential Care Facilities and Social Assistance.

Industries in the Ambulatory Health Care Services sub-sector provide health care services directly or indirectly to ambulatory patients and do not usually provide inpatient services. Health practitioners in this sub-sector provide outpatient services, with the facilities and equipment not usually being the most significant part of the production process.

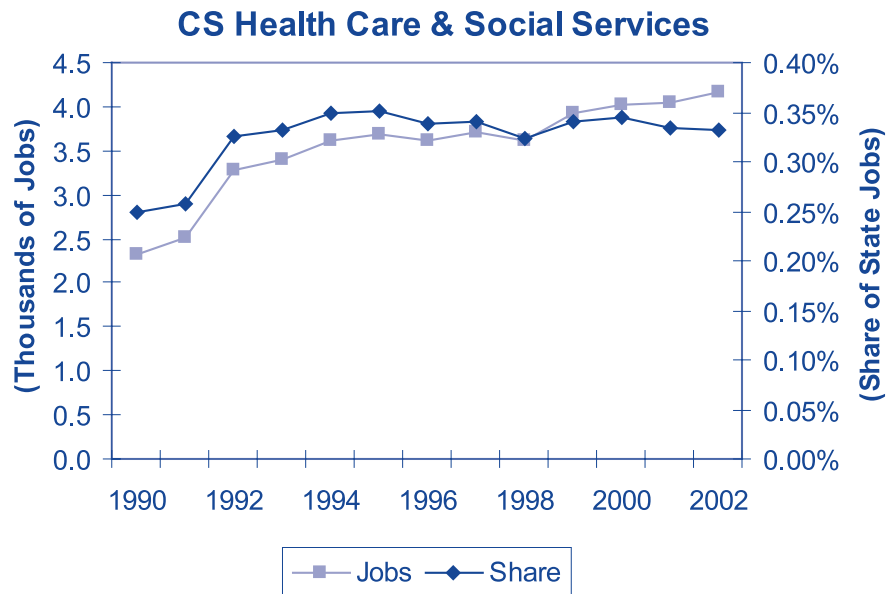
Industries in the Hospitals sub-sector provide medical, diagnostic, and treatment services that include physician, nursing, and other health services to inpatients and the specialized accommodation services required by inpatients. Hospitals may also provide outpatient services as a secondary activity. Establishments in the Hospitals sub-sector provide inpatient health services, many of, which can only be provided using the specialized facilities and equipment that form a significant and integral part of the production process.

Industries in the Nursing and Residential Care Facilities sub-sector provide residential care combined with either nursing, supervisory, or other types of care as required by the residents. In this sub-sector, the facilities are a significant part of the production process and the care provided is a mix of health and social services with the health services being largely some level of nursing services.

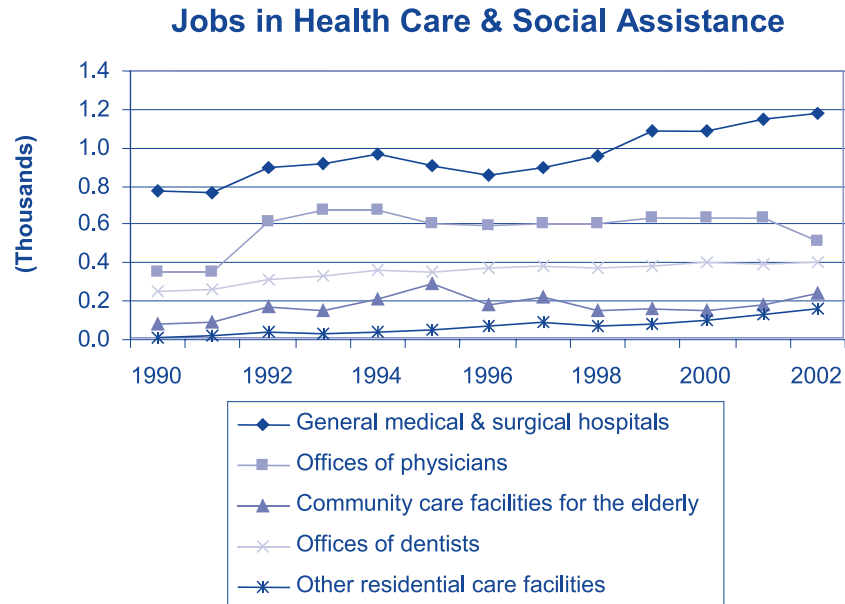
Industries in the Social Assistance sub-sector provide a wide variety of social assistance services directly to their clients. These services do not include residential or accommodation services, except on a short stay basis.

The Health Care and Social Services sector is one of the fastest growing sectors in the CA economy. During the 1990-2002 period, this sector grew from 932,000 jobs to 1,254,000 jobs, an increase of 322,000 or 36%. Health Care and Social Services was second only to All Government in job growth in CA between 1990 and 2002.

This sector was also a leader in job growth in the CS economic region. The following line graph shows favorable trends in both number of jobs and share of statewide job growth in the Health Care and Social Services sector.



Jobs in the Health Care & Social Services sector were concentrated in five sub-sectors led by the growth in jobs in the General medical & surgical hospital sub-sector. Offices of physicians were second in the generation of net new jobs although there was a drop in job generation by this sub-sector between 2001 and 2002.



General medical & surgical hospitals have the highest number of jobs and the largest job growth of all the sub-sectors in the CS economic region. This sub-sector grew from 800 jobs in 1990 to 1,200 in 2002 for an increase of 400, or 50%. Offices of physicians were second growing from 300 jobs in 1990 to 500 in 2002. While these gains are small in number, the following table indicates that all fifteen of the sub-sectors with employment in the Health Care & Social Assistance sector in the CS economic region showed modest gains in employment over the thirteen year period.

Central Sierra
Health Care & Social Assistance
(Thousands of Jobs)

	1990	1994	2000	2002
General medical & surgical hospitals	0.8	1.0	1.1	1.2
Offices of physicians	0.3	0.7	0.6	0.5
Community care facilities for the elderly	0.1	0.2	0.2	0.2
Offices of dentists	0.3	0.4	0.4	0.4
Other residential care facilities	0.0	0.0	0.1	0.2
Home health care services	0.0	0.1	0.2	0.1
Other ambulatory health care services	0.1	0.1	0.1	0.2
Offices of other health practitioners	0.1	0.2	0.2	0.3
Outpatient care centers	0.1	0.1	0.1	0.2
Individual & family services	0.1	0.1	0.2	0.2
Vocational rehabilitation services	0.0	0.1	0.1	0.1
Emergency & other relief services	0.0	0.0	0.0	0.1
Child day care services	0.1	0.2	0.1	0.1
Residential mental health facilities	0.1	0.1	0.1	0.1
Nursing care facilities	0.3	0.3	0.4	0.4
Medical & diagnostic laboratories	0.0	0.0	0.0	0.0

Source: California Employment Development Department

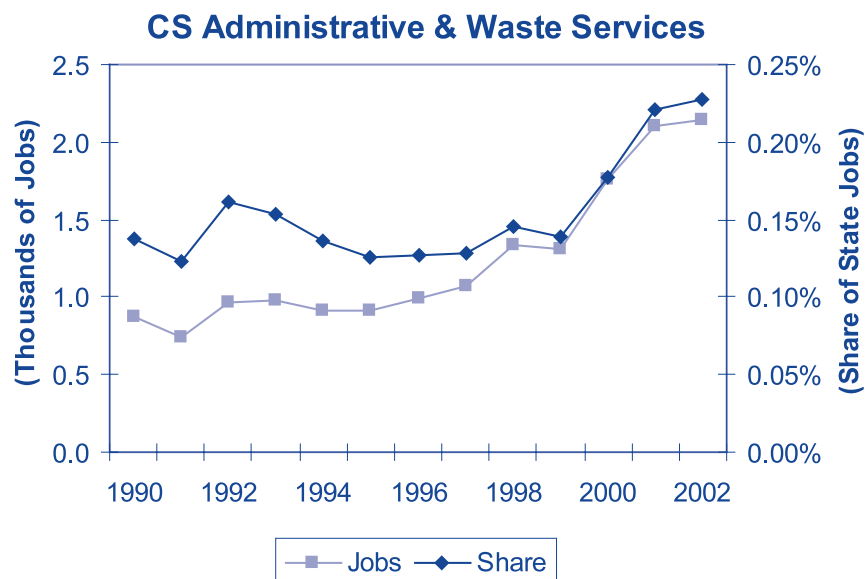
Administrative & Waste Services

Administrative & Waste Services is another new category introduced by the NAICS coding system. This sector includes Administrative and Support Services and Waste Management and Remediation Services.

Industries in the Administrative and Support Services sub-sector group establishments engaged in activities that support the day-to-day operations of other organizations. The processes employed in this sector (e.g., general management, personnel administration, clerical activities, cleaning activities) are often integral parts of the activities of establishments found in all sectors of the economy. The establishments classified in this sub-sector have specialized in one or more of these activities and can, therefore, provide services to clients in a variety of industries and, in some cases, to households. The individual industries of this sub-sector are defined on the basis of the particular process that they are engaged in and the particular services they provide.

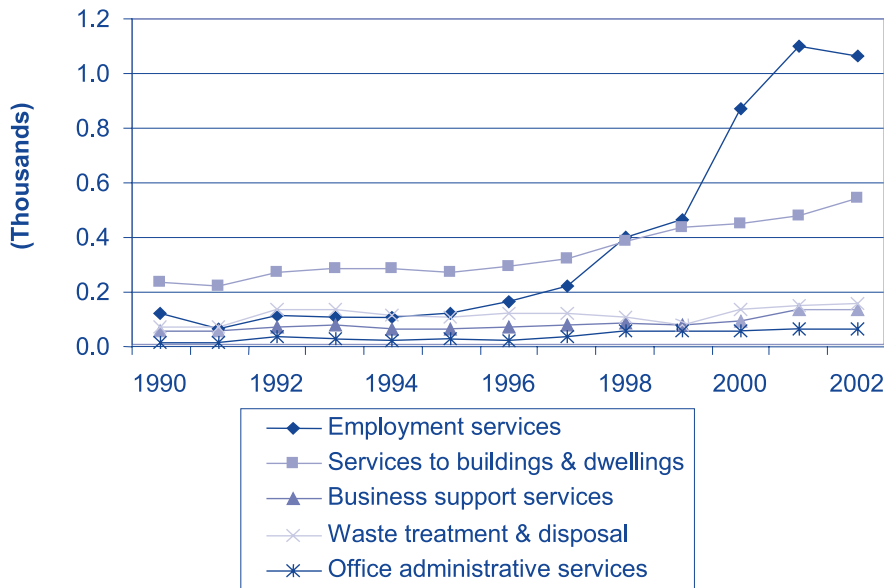
Industries in the Waste Management and Remediation Services sub-sector group establishments engaged in the collection, treatment, and disposal of waste materials. This includes establishments engaged in local hauling of waste materials; operating materials recovery facilities (i.e., those that sort recyclable materials from the trash stream); providing remediation services (i.e., those that provide for the cleanup of contaminated buildings, mine sites, soil, or ground water); and providing septic pumping and other miscellaneous waste management services. There are three industry groups within the sub-sector that separate these activities into waste collection, waste treatment and disposal, and remediation and other waste management.

Administrative & Waste Services is a rapidly growing sector of the CA economy driven by the employment services sub-sector. During the 1990-2002 period this sector grew from 633,000 jobs in 1990 to 945,000 jobs in 2002 for an increase of 312,000 jobs over the thirteen year period, an increase of just under 50%. This made Administrative & Waste Services the third fastest growing sector in the CA economy with 65% of this growth being in the employment services sub-sector.



Job growth in the CS economic region in the Administrative & Waste Services sector trailed job share for most of the 90's but began to gain parity in its share of statewide growth in 1999. Job growth was driven by the employment services sector, which experienced a strong increase in jobs beginning in 1995 and accelerating dramatically after 1999. Services to buildings and dwellings were the second highest provider of jobs in the CS economic region followed by business support services, waste treatment & disposal and office administrative services.

Jobs in Administrative & Waste Services



Employment services led the CS economic region in job growth increasing from 100 jobs in 1990 to 1,100 jobs in 2002. Services to buildings added 300 net new jobs during the period while three other sub-sectors had modest gains.

Central Sierra
Administrative & Waste Services

(Thousands of Jobs)

	1990	1994	2000	2002
Employment services	0.1	0.1	0.9	1.1
Services to buildings & dwellings	0.2	0.3	0.5	0.5
Business support services	0.1	0.1	0.1	0.1
Waste treatment & disposal	0.1	0.1	0.1	0.2
Office administrative services	0.0	0.0	0.1	0.1
Travel arrangement & reservation services	0.0	0.1	0.1	0.1
Waste collection	0.0	0.0	0.0	0.0
Remediation & other waste services	0.1	0.1	0.0	0.0
Facilities support services	0.0	0.0	0.0	0.0
Other support services	0.1	0.0	0.0	0.0
Investigation & security services	0.1	0.0	0.0	0.0

Source: California Employment Development Department

Retail Trade

The NAICS Retail Trade sector is virtually the same as it was in the SIC coding system, with the exception of the Food Services & Accommodations sub-sector, which is now classified as a stand-alone sector.

The Retail Trade sector comprises establishments engaged in retailing merchandise, generally without transformation, and rendering services incidental to the sale of merchandise. The retailing process is the final step in the distribution of merchandise; retailers are, therefore, organized to sell merchandise in small quantities to the general public. This sector comprises two main types of retailers: store and non-store retailers.

1. Store retailers operate fixed point-of-sale locations, located and designed to attract a high volume of walk-in customers. In general, retail stores have extensive displays of merchandise and use mass-media advertising to attract customers. They typically sell merchandise to the general public for personal or household consumption, but some also serve business and institutional clients. These include establishments, such as office supply stores, computer and software stores, building materials dealers, plumbing supply stores, and electrical supply stores. Catalog showrooms, gasoline services stations, automotive dealers, and mobile home dealers are treated as store retailers.

In addition to retailing merchandise, some types of store retailers are also engaged in the provision of after-sales services, such as repair and installation. For example, new automobile dealers, electronic and appliance stores, and musical instrument and supply stores often provide repair services. As a general rule, establishments engaged in retailing merchandise and providing after-sales services are classified in this sector.

2. Non-store retailers, like store retailers, are organized to serve the general public, but their retailing methods differ. The establishments of this sub-sector reach customers and market merchandise with methods, such as the broadcasting of “infomercials,” the broadcasting and publishing of direct-response advertising, the publishing of paper and electronic catalogs, door-to-door solicitation, in-home demonstration, selling from portable stalls (street vendors, except food), and distribution through vending machines. Establishments engaged in the direct sale (non-store) of products, such as home heating oil dealers and home delivery newspaper routes are included here.

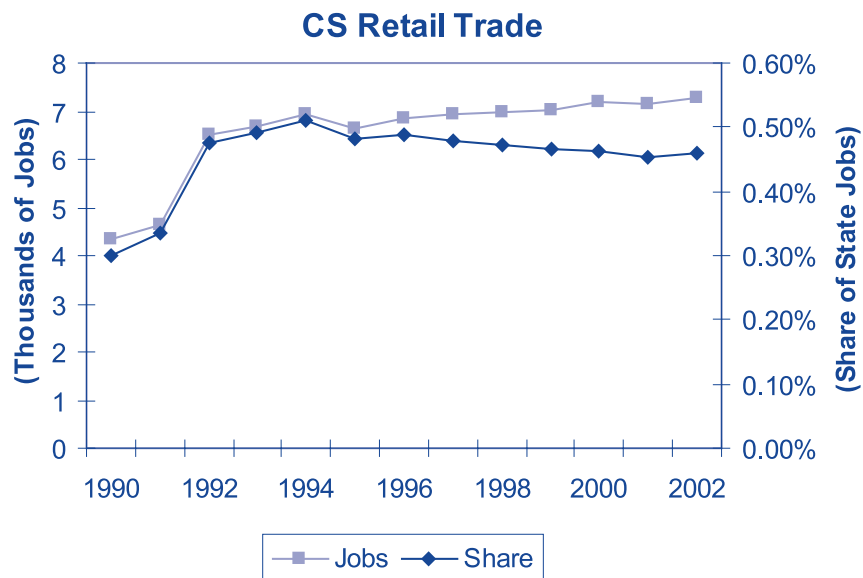
The buying of goods for resale is a characteristic of retail trade establishments that particularly distinguishes them from establishments in the agriculture, manufacturing, and construction industries. For example, farms that sell their products at or from the point of production are not classified in retail, but rather in agriculture. Similarly, establishments that both manufacture and sell their products to the general public are not classified in retail, but rather in manufacturing. However, establishments that engage in processing activities incidental to retailing are classified in retail. This includes establishments, such as optical goods stores that do in-store grinding of lenses, and meat and seafood markets.

Wholesalers also engage in the buying of goods for resale, but they are not usually organized to serve the general public. They typically operate from a warehouse or office and neither the design nor the location of these premises is intended to solicit a high volume of walk-in traffic. Wholesalers supply institutional, industrial, wholesale, and retail clients; their

operations are, therefore, generally organized to purchase, sell, and deliver merchandise in larger quantities. However, dealers of durable non-consumer goods, such as farm machinery and heavy-duty trucks, are included in wholesale trade even if they often sell these products in single units.

Retail Trade plays an important role in the State's economy. During the period 1990-2002 this sector grew from 1.44 million jobs to 1.58 jobs, a growth of 140,000 over the thirteen-year period, or 97%. Statewide, job growth in the retail sector was driven by, Motor Vehicle and Parts dealers which added 36,400 jobs, Automobile Dealers which added 33,300, Food and Beverage stores which added over 30,000 jobs and Building Material and Garden Supply stores which added 20,600 jobs.

As can be seen from the following line graph, the CS businesses in Retail Trade increased jobs in the economic region slowly, but steadily between 1992 and 2002. Moreover the regions share of job growth in Retail Trade statewide fell somewhat after 1995 indicating that the CS region was not keeping pace with statewide job growth in the Retail Trade sector.



There were some differences and some similarities between the sub-sectors driving Retail Trade job growth in the region from those driving job growth statewide. Job growth in the CS economic region was led by Grocery stores followed by Department stores and Gasoline stations. Sporting Goods and musical instrument stores, and Automobile dealers also contributed to job growth in the CS economic region. These five industries all showed steady growth or stability over the thirteen-year period.



Department store jobs increased by 800 during the 1990-2002 period. Grocery store jobs increased by 500 and gasoline station jobs increased by 300. None of the sub-sectors in Retail Trade had a net loss in jobs during over the thirteen year period although some showed no change.

Central Sierra Retail Trade (Thousands of Jobs)				
	1990	1994	2000	2002
Department stores	0.1	0.9	0.9	0.9
Grocery stores	1.1	1.5	1.6	1.6
Gasoline stations	0.4	0.7	0.7	0.7
Sporting goods & musical instrument stores	0.1	0.3	0.3	0.4
Automobile dealers	0.2	0.3	0.3	0.3
Office supplies, stationery, & gift stores	0.1	0.2	0.3	0.3
Health & personal care stores	0.4	0.6	0.5	0.5
Clothing stores	0.1	0.2	0.2	0.2
Building material & supplies dealers	0.5	0.6	0.7	0.6
Beer, wine, & liquor stores	0.0	0.1	0.1	0.1
Direct selling establishments	0.1	0.3	0.3	0.2
Other miscellaneous store retailers	0.1	0.2	0.2	0.2
Electronics & appliance stores	0.1	0.1	0.1	0.1
Auto parts, accessories, & tire stores	0.2	0.2	0.2	0.2
Furniture stores	0.0	0.0	0.1	0.1
Used merchandise stores	0.0	0.0	0.1	0.1
Book, periodical, & music stores	0.0	0.1	0.1	0.1
Home furnishings stores	0.1	0.2	0.2	0.2
Other motor vehicle dealers	0.0	0.0	0.0	0.0
Florists	0.0	0.1	0.0	0.1
Vending machine operators	0.0	0.0	0.0	0.0
Shoe stores	0.0	0.0	0.0	0.0
Jewelry, luggage, & leather goods stores	0.0	0.0	0.0	0.0
Electronic shopping & mail-order houses	0.0	0.0	0.0	0.0
Lawn & garden equipment & supplies stores	0.1	0.1	0.0	0.0
Other general merchandise stores	0.2	0.2	0.2	0.2
Specialty food stores	0.1	0.1	0.1	0.1

Source: California Employment Development Department

Accommodations & Food Services

Accommodations & Food Services is a new NAICS sector made up primarily of sub-sectors removed from the Retail Trade sector in the SIC coding system. The Accommodation and Food Services sector comprises establishments providing customers with lodging and/or preparing meals, snacks, and beverages for immediate consumption.

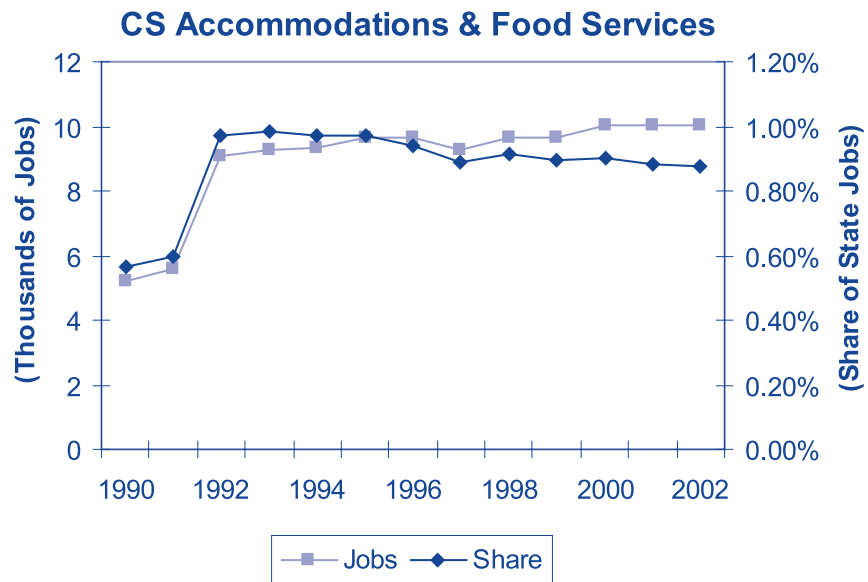
The sector includes both accommodation and food services establishments because the two activities are often combined at the same establishment. Excluded from this sector are civic and social organizations; amusement and recreation parks; theaters; and other recreation or entertainment facilities providing food and beverage services.

Industries in the Accommodation sub-sector provide lodging or short-term accommodations for travelers, vacationers, and others. There is a wide range of establishments in these industries. Some provide lodging only; while others provide meals, laundry services, and recreational facilities, as well as lodging. Lodging establishments are classified in this sub-sector even if the provision of complementary services generates more revenue. The types of complementary services provided vary from establishment to establishment.

Industries in the Food Services and Drinking Places sub-sector prepare meals, snacks, and beverages to customer order for immediate on-premises and off-premises consumption. There is a wide range of establishments in these industries. Some provide food and drink only while others provide various combinations of seating space, waiter/waitress services and incidental amenities, such as limited entertainment. The industries in the sub-sector are grouped based on the type and level of services provided. The industry groups are full-service restaurants; limited-service eating places; special food services, such as food service contractors, caterers, and mobile food services; and drinking places.

The Accommodations & Food Services sector contributed 234,800 net new jobs to the CA economy between 1990 and 2002. The sector grew from 917,000 jobs in 1990 to 1,151,800 jobs in 2002, a growth rate of 26% over the thirteen year period. Key sub-sectors in the Accommodations & Food Services sector are full service restaurants and limited services eating-places, which added 129,200 net new jobs and 123,200 net new jobs respectively during the 1990-2002 period. Jobs in Accommodations fell statewide.

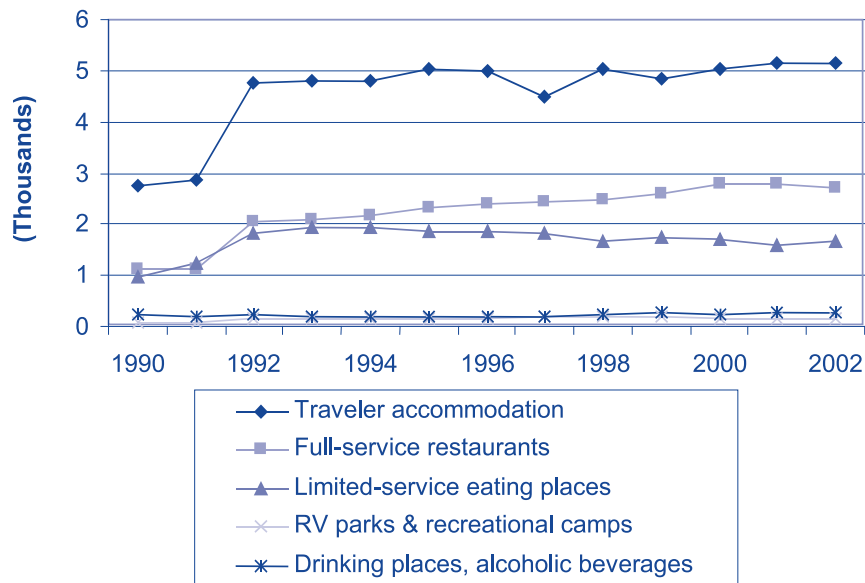
Job growth in the CS economic region for the Accommodations & Food Services sector showed a steady but slow increase over the 1990-2002 period. This period began with the CS job share being slightly favorable regarding industry growth in the State. However, beginning in 1996, the CS regions share of industry job growth statewide fell somewhat below the State average and remained so for the balance of the thirteen-year period.



The five sub-sectors driving job growth in the CS economic region are traveler accommodations, full services restaurants, limited service eating places, RV parks and recreational camps and drinking places. Most of the jobs and job growth are in the traveler accommodation sub-sector and the limited services eating places sub-sector.

These two sectors had steady growth from 1992 to 2002 accounting for an increase in jobs from 2,700 to 5,200 for traveler accommodations and 1,100 to 2,700 for limited services eating-places. This represents an increase of over 4,000 jobs between the two sub-sectors.

Jobs in Accommodations & Food Services



Central Sierra Accommodations & Food Services

(Thousands of Jobs)

	1990	1994	2000	2002
Traveler accommodation	2.7	4.8	5.1	5.2
Limited-service eating places	1.1	2.2	2.8	2.7
Traveler accommodation	1.0	1.9	1.7	1.7
Rooming and boarding houses	0.1	0.1	0.2	0.2
RV parks and recreational camps	0.2	0.2	0.2	0.3
Drinking places, alcoholic beverages	0.0	0.0	0.0	0.0
Special food services	0.0	0.1	0.0	0.1

Source: California Employment Development Department

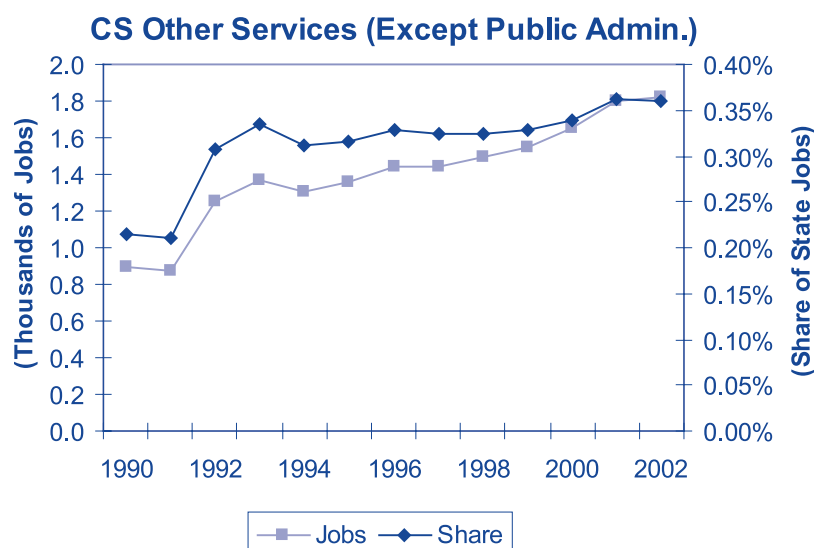
Other Services (Except Public Administration)

Another new NAICS sector is Other Services (Except Public Administration). This sector includes many of the sub-sectors previously found in the Services sector of the SIC codes.

The Other Services (Except Public Administration) sector comprises establishments engaged in providing services not specifically provided for elsewhere in the classification system. Establishments in this sector are primarily engaged in activities, such as equipment and machinery repairing, promoting or administering religious activities, grant-making, advocacy, and providing dry-cleaning and laundry services, personal care services, death care services, pet care services, photo finishing services, temporary parking services, and dating services. Private households that engage in employing workers on or about the premises in activities primarily concerned with the operation of the household are included in this sector. Excluded from this sector are establishments primarily engaged in retailing new equipment and also performing repairs and general maintenance on equipment. These establishments are classified in Sector 44-45, Retail Trade.

This sector added over 90,000 net new jobs to the CA economy between 1990 and 2002. The sector was driven statewide by membership associations and organizations and repair and maintenance firms, which added 49,700 and 24,900 net new jobs to the CA economic base during this period.

Job growth in the Other Services sector in the CS economic region had a favorable job share rating throughout the period and job growth showed an equally favorable trend adding significantly to the employment base in the region growing from 900 jobs to almost 2000 jobs over the thirteen year period.



Three sub-sectors, automotive repair and maintenance, professional and similar organizations and grantmaking organizations led job growth in the CS economic region. Automotive repair and maintenance added 300 jobs while professional and similar organizations and grantmaking organizations added 200 jobs each. A number of other sub-sectors added 100 or more jobs to the region's economic base during the thirteen-year period.

Jobs in Other Svcs. (Except Public Admin.)



Central Sierra

Other Services (Except Public Administration)

(Thousands of Jobs)

	1990	1994	2000	2002
Automotive repair & maintenance	0.2	0.3	0.4	0.5
Professional & similar organizations	0.2	0.3	0.4	0.4
Grantmaking & giving services	0.0	0.1	0.2	0.2
Social advocacy organizations	0.1	0.1	0.1	0.2
Dry cleaning & laundry services	0.0	0.1	0.1	0.1
Civic & social organizations	0.0	0.1	0.1	0.1
Religious organizations	0.1	0.2	0.2	0.2
Household goods repair & maintenance	0.0	0.0	0.0	0.0
Death care services	0.0	0.0	0.0	0.0
Commercial machinery repair & maintenance	0.0	0.0	0.0	0.0
Other personal services	0.0	0.0	0.0	0.0
Electronic equipment repair & maintenance	0.0	0.0	0.0	0.0
Personal care services	0.1	0.1	0.1	0.1

Real Estate & Rental & Leasing

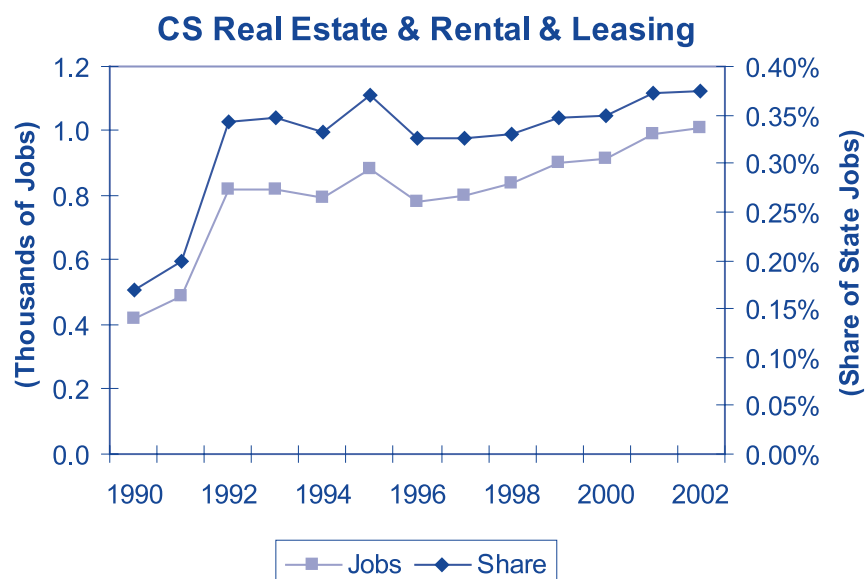
Industries in the Real Estate sub-sector group establishments that are primarily engaged in renting or leasing real estate to others; managing real estate for others; selling, buying, or renting real estate for others; and providing other real estate related services, such as appraisal services.

Industries in the Rental and Leasing Services sub-sector include establishments that provide a wide array of tangible goods, such as automobiles, computers, consumer goods, and industrial machinery and equipment, to customers in return for a periodic rental or lease payment. The sub-sector includes two main types of establishments: (1) those that are engaged in renting consumer goods and equipment; and, (2) those that are engaged in leasing machinery and equipment of the kind often used for business operations.

Industries in the Lessors of Non-financial Intangible Assets (except Copyrighted Works) sub-sector include establishments that are primarily engaged in assigning rights to assets, such as patents, trademarks, brand names, and/or franchise agreements for which a royalty payment or licensing fee is paid to the asset holder. Establishments in this sub-sector own the patents, trademarks, and/or franchise agreements that they allow others to use or reproduce for a fee and may or may not have created those assets.

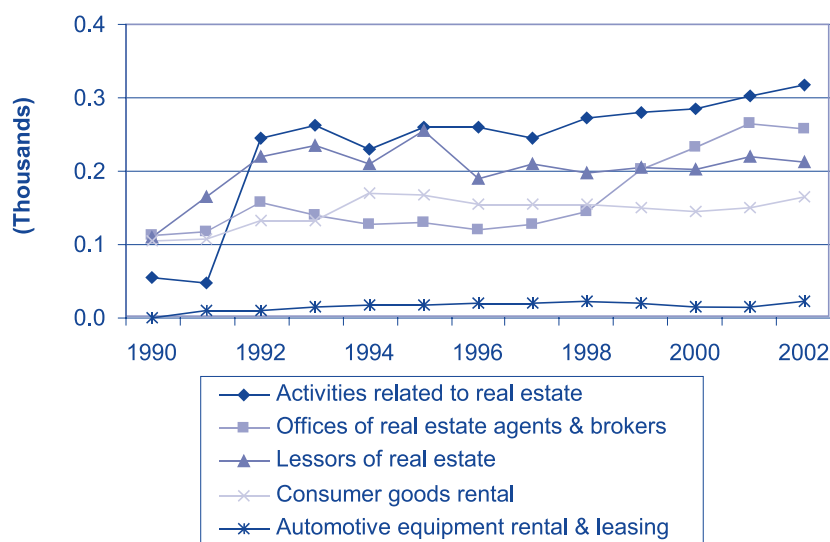
Real Estate & Rental & Leasing firms added 23,600 net new jobs to the CA economy during the 1990-2002 period. This sector grew from 246,100 jobs in 1990 to 269,700 jobs in 2002, an increase of just below 10%. Real estate sub-sector, which added 16,100 jobs, and the rental and leasing services sub-sector, which added 9,500 jobs during the thirteen-year period, led the sector.

The growth of jobs in this sector held by the CS economic region grew steadily from 1996 until 2002 after falling from its peak in 1995 with its share of statewide industry growth above the average for the entire period as can be seen by the line graph presented below.



Job growth during the 1990-2002 period was driven by five sub-sectors with activities related to real estate and offices of real estate agents & brokers showing the largest increase. The Activities related to real estate sub-sector comprises establishments primarily engaged in performing real estate related services (except lessors of real estate, offices of real estate agents and brokers, real estate property managers, and offices of real estate appraisers). The Offices of real estate agents & brokers sub-sector comprises establishments primarily engaged in acting as agents and/or brokers in one or more of the following: (1) selling real estate for others; (2) buying real estate for others; and (3) renting real estate for others.

Jobs in Real Estate & Rentals & Leasing



Activities related to real estate grew from 100 jobs in 1990 to 300 jobs in 2002 for an increase of 200. Offices of real estate agents & brokers have a similar increase of 200 jobs during the period. Lessors of real estate and consumer goods rental added another 200 jobs while the other three sub-sectors showed no job growth or job growth less than 100 in each sub-sector.

Central Sierra Real Estate & Rentals & Leasing (Thousands of Jobs)

	1990	1994	2000	2002
Activities related to real estate	0.1	0.2	0.3	0.3
Offices of real estate agents & brokers	0.1	0.1	0.2	0.3
Lessors of real estate	0.1	0.2	0.2	0.2
Consumer goods rental	0.1	0.2	0.1	0.2
Automotive equipment rental & leasing	0.0	0.0	0.0	0.0
Machinery & equipment rental & leasing	0.0	0.0	0.0	0.0
General rental centers	0.0	0.0	0.0	0.0

Source: California Employment Development Department

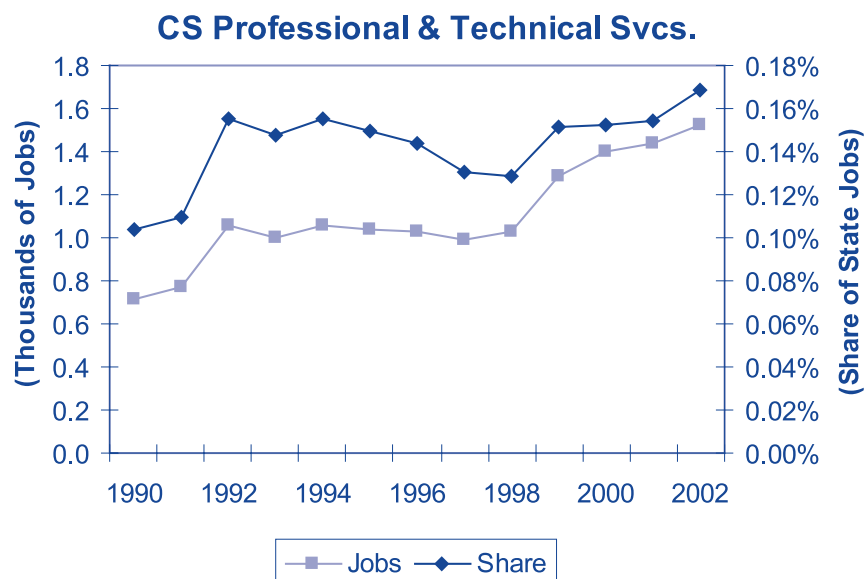
Professional & Technical Services

Industries in the Professional, Scientific, and Technical Services sub-sector group establishments engaged in processes where human capital is the major input. These establishments make available the knowledge and skills of their employees, often on an assignment basis, where an individual or team is responsible for the delivery of services to the client. The individual industries of this sub-sector are defined on the basis of the particular expertise and training of the services provider.

The distinguishing feature of the Professional, Scientific, and Technical Services sub-sector is the fact that most of the industries grouped in it have production processes that are almost wholly dependent on worker skills. In most of these industries, equipment and materials are not of major importance, unlike health care, for example, where “high tech” machines and materials are important collaborating inputs to labor skills in the production of health care. Thus, the establishments classified in this sub-sector sell expertise. Much of the expertise requires degrees, though not in every case.

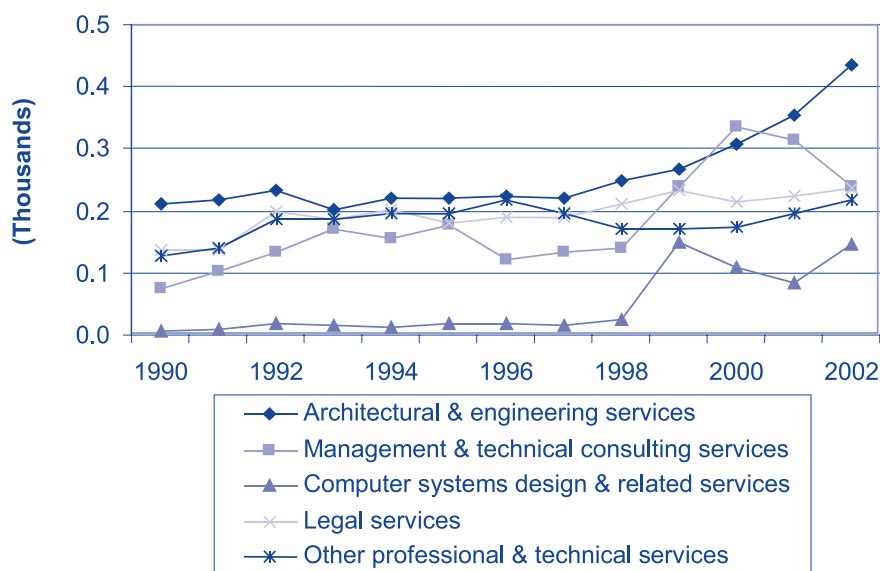
Professional & Technical Services is a major generator of jobs in CA. This sector added 217,600 during the 1990-2002 period growing from 687,100 in 1990 to 904,700 in 2002 for a growth rate of 32% over the thirteen-year period. This sector was led by computer systems design and related services which added 106,900 jobs, management and technical consulting services which added 37,400 jobs and architectural and engineering services which added 29,200 jobs.

Job growth in the Professional & Technical sector in the CS economic region was flat between 1992 and 1998 but increased significantly from 1998 to 2002. The CS economic region lost job share between 1992 and 1999 but significantly increased its share of industry jobs statewide during the 1998 to 2002 period.



Job growth in the Professional and Technical Services sector in the CS economic region was driven by architectural and engineering services and management and technical consulting services with some growth in computer systems design and related services between 1998 and 2002. Architectural and engineering services grew steadily since 1997 while management and technical consulting services showed strong growth between 1998 and 2000, but dropped significantly between 2000 and 2002.

Jobs in Professional & Technical Svcs.



Architectural and engineering services added 200 jobs between 1990 and 2002. Management and technical consulting services added 200 jobs during the same period, but came from a base of less than 100 in 1990. Other sub-sectors adding up to 200 jobs were legal services, other professional and technical services and accounting and bookkeeping services.

Central Sierra Professional & Technical Svcs. (Thousands of Jobs)				
	1990	1994	2000	2002
Architectural & engineering services	0.2	0.2	0.3	0.4
Management & technical consulting services	0.0	0.2	0.3	0.2
Computer systems design & related services	0.0	0.0	0.1	0.1
Legal services	0.0	0.2	0.2	0.2
Other professional & technical services	0.0	0.2	0.2	0.2
Accounting & bookkeeping services	0.0	0.2	0.2	0.2
Advertising & related services	0.0	0.0	0.0	0.0
Scientific research & development services	0.0	0.0	0.0	0.0
Specialized design services	0.1	0.0	0.0	0.0

Source: California Employment Development Department

Arts, Entertainment, & Recreation

Three sub-sectors are included in the Arts, Entertainment, & Recreation sector under the NAICS coding system. Industries in the Performing Arts, Spectator Sports, and Related Industries sub-sector group establishments that produce or organize and promote live presentations involving the performances of actors and actresses, singers, dancers, musical groups and artists, athletes, and other entertainers, including independent (i.e., freelance) entertainers and the establishments that manage their careers.

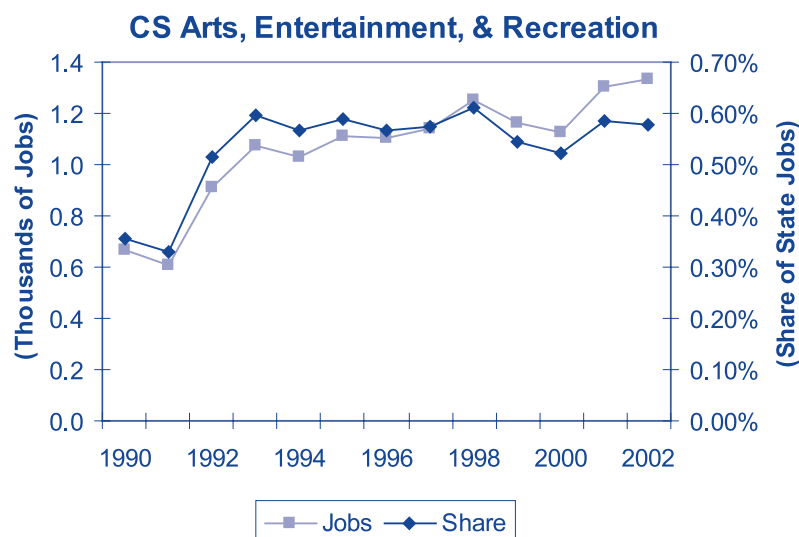
The classification recognizes four basic processes: (1) producing (i.e., presenting) events; (2) organizing, managing, and/or promoting events; (3) managing and representing entertainers; and, (4) providing the artistic, creative and technical skills necessary to the production of these live events. Also, this sub-sector contains four industries for performing arts companies. Each is defined on the basis of the particular skills of the entertainers involved in the presentations

Industries in the Museums, Historical Sites, and Similar Institutions sub-sector engage in the preservation and exhibition of objects, sites, and natural wonders of historical, cultural, and/or educational value.

Industries in the Amusement, Gambling, and Recreation Industries sub-sector (1) operate facilities where patrons can primarily engage in sports, recreation, amusement, or gambling activities; and/or, (2) provide other amusement and recreation services, such as supplying and servicing amusement devices in places of business operated by others; operating sports teams, clubs, or leagues engaged in playing games for recreational purposes; and guiding tours without using transportation equipment.

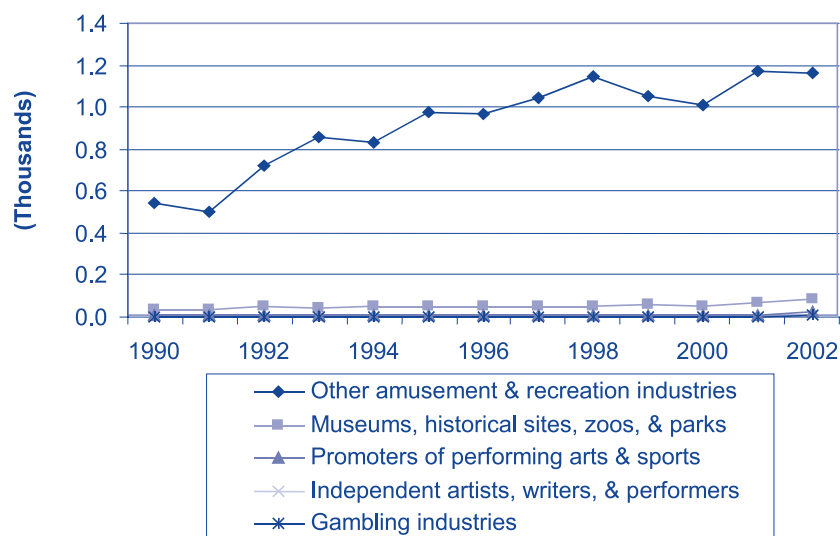
The Arts, Entertainment and Recreation sector in California was led by the amusements, gambling and recreation sub-sector, which added 51,600 jobs to the State's job base during the 1990-2002 period. This sub-sector was followed by the museums, historical sites, and zoos and parks sub-sector, which added 4,300 jobs.

Job growth in the Arts, Entertainment & Recreation sector in the CS economic region was slow, but steady from 1993 to 1998, dropped between 1998 and 2001 and then began to grow again. Since 1998, the CS economic region's share of statewide growth in this sector has been below the rate of growth for this industry in the State.



Job growth in the Arts, Entertainment & Recreation sector in the CS region has been driven by the other amusement & recreation industry category. This industry comprises (1) establishments primarily engaged in operating golf courses (except miniature); and, (2) establishments primarily engaged in operating golf courses, along with dining facilities and other recreational facilities that are known as country clubs. These establishments often provide food and beverage services, equipment rental services, and golf instruction services.

Jobs in Arts, Entertainment, & Recreation



The other amusement and recreation industries sub-category added 700 jobs during the 1990-2002 period growing from 500 jobs in 1990 to 1,200 jobs in 2002. Museums, historical sites, zoos and parks added 100 jobs and performing arts companies added 100 jobs to round out job growth in this sector during the thirteen year period.

Central Sierra				
Arts, Entertainment, & Recreation				
(Thousands of Jobs)				
	1990	1994	2000	2002
Other amusement & recreation industries	0.5	0.8	1.0	1.2
Museums, historical sites, zoos, & parks	0.0	0.0	0.1	0.1
Promoters of performing arts & sports	0.0	0.0	0.0	0.0
Independent artists, writers, & performers	0.0	0.0	0.0	0.0
Gambling industries	0.0	0.0	0.0	0.0
Spectator sports	0.0	0.0	0.0	0.0
Agents & managers for public figures	0.0	0.0	0.0	0.0
Amusement parks & arcades	0.0	0.0	0.0	0.0
Performing arts companies	0.1	0.1	0.1	0.1

Source: California Employment Development Department

APPENDIX A

Industries Included in Regional Economic Base

All Government

Local government /1
State government /2
Federal government /3

Construction

Building foundation & exterior contractors
Building finishing contractors
Building equipment contractors
Other specialty trade contractors
Highway, street, & bridge construction
Land subdivision
Residential building construction
Nonresidential building construction
Other heavy construction
Utility system construction

Health Care & Social Assistance

Offices of physicians
General medical & surgical hospitals
Nursing care facilities
Offices of dentists
Residential mental health facilities
Community care facilities for the elderly
Child day care services
Individual & family services
Other residential care facilities
Outpatient care centers
Vocational rehabilitation services
Offices of other health practitioners
Emergency & other relief services
Home health care services
Other ambulatory health care services
Medical & diagnostic laboratories
Other hospitals
Psychiatric & substance abuse hospitals

Administrative & Waste Services

Employment services
Services to buildings & dwellings
Business support services
Travel arrangement & reservation services
Investigation & security services
Facilities support services
Office administrative services
Other support services
Waste collection
Remediation & other waste services
Waste treatment & disposal

Retail Trade

Department stores
Grocery stores
Automobile dealers
Building material & supplies dealers
Health & personal care stores
Gasoline stations
Electronics & appliance stores
Auto parts, accessories, & tire stores
Clothing stores
Used merchandise stores
Office supplies, stationery, & gift stores
Other motor vehicle dealers
Sporting goods & musical instrument stores
Other miscellaneous store retailers
Home furnishings stores
Jewelry, luggage, & leather goods stores
Specialty food stores
Furniture stores
Book, periodical, & music stores
Vending machine operators
Electronic shopping & mail-order houses
Florists
Beer, wine, & liquor stores
Shoe stores
Lawn & garden equipment & supplies stores
Direct selling establishments
Other general merchandise stores

Accommodations & Food Services

Limited-service eating places
Full-service restaurants
Traveler accommodation
Rooming & boarding houses
RV parks & recreational camps
Drinking places, alcoholic beverages
Special food services

Other Services

Automotive repair & maintenance
Religious organizations
Grant making & giving services
Social advocacy organizations
Personal care services
Professional & similar organizations
Death care services
Civic & social organizations
Dry cleaning & laundry services
Other personal services
Commercial machinery repair & maintenance
Household goods repair & maintenance
Electronic equipment repair & maintenance

Real Estate & Rentals & Leasing

Activities related to real estate
Offices of real estate agents & brokers
Lessors of real estate
Consumer goods rental
Automotive equipment rental & leasing
Machinery & equipment rental & leasing
General rental centers

Professional & Technical Services

Architectural & engineering services
Management & technical consulting services
Computer systems design & related services
Legal services
Other professional & technical services
Accounting & bookkeeping services
Advertising & related services
Scientific research & development services
Specialized design services

Arts, Entertainment, & Recreation
Other amusement & recreation industries
Museums, historical sites, zoos, & parks
Promoters of performing arts & sports
Independent artists, writers, & performers
Gambling industries
Spectator sports
Agents & managers for public figures
Amusement parks & arcades
Performing arts companies

/1 - Local government includes local education.

/2 - State government includes state education.

/3 - Federal government includes defense.

